

The EOFY Technology Checklist

40 Questions to Ask
Before You Sign Anything

A practical self-assessment for
Australian technology leaders



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INTRODUCTION

This checklist is a structured self-assessment for senior technology leaders preparing their organisation for the end of the financial year. It is not a readiness framework or a vendor recommendation. It is forty direct questions designed to surface where your organisation is exposed before June 30 – in procurement, cloud cost, software licensing, deferred decisions, and strategic investment planning.

The five domains in this checklist represent the five highest-ROI areas for pre-EOFY technology review. Each domain contains eight questions. Answer each question honestly – Yes, Partially, or No – and tally your score using the rubric at the end of each section. The summary scoring table at the end of the document gives you an overall picture across all five domains.

Completing this checklist honestly takes approximately 20 to 30 minutes. Most senior technology leaders will be able to answer the majority of questions from their own knowledge, though some questions will prompt you to check – and that is the point.

HOW TO USE THIS CHECKLIST

Scoring: Answer each question Yes, Partially, or No.

Yes = 2 points
Partially = 1 point
No = 0 points

Maximum score per domain: 16 points (8 questions × 2)

Maximum total score: 80 points

Score each domain as you go using the rubric at the end of each section. Enter your domain scores in the Summary Scoring Table at the end of the checklist for an overall picture.

Procurement Integrity

EOFY procurement decisions are among the most financially exposed decisions an organisation makes. The combination of expiring budgets, vendor urgency, and compressed timelines creates the conditions for commitments that look reasonable in June and expensive in September. This domain assesses whether your organisation has the controls in place to ensure spending decisions are well-validated before commitment – regardless of the time pressure attached to them.

#	Question	Yes	Partially	No
1	Do procurement decisions above a defined threshold go through a structured validation process before approval – including vendor justification, security assessment, and commercial review?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Are quotes independently checked against current market pricing before a purchase order is raised?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Do vendor selection processes include minimum security and configuration requirements as explicit criteria – not just price and features?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Do multi-year contract commitments require explicit sign-off from a named executive, separate from the standard procurement approval chain?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Does your procurement process distinguish clearly between strategic purchases and budget-clearing purchases, with different validation requirements for each?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Are hardware specifications for any EOFY purchases being validated against confirmed FY27 operational requirements – not extrapolated from FY26 usage patterns?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Before any new software licence purchase is approved, is it cross-checked against existing entitlements in your software asset register to confirm no duplication?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Is there a defined and documented approval process for purchases above a threshold value, with clear accountability for who signs off and who can override?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Domain Scoring

Score	Indicator	What it Means
13-16	Strong	Your procurement controls are well-established. Review your Partially answers for any quick wins before June 30 – most will be process gaps rather than structural ones.
8-12	Developing	There are meaningful gaps in your procurement controls. The No answers in this domain represent the highest-risk commitments you could make before June 30. Address them first.
0-7	At Risk	Your organisation is making significant purchase decisions without adequate validation controls. EOFY conditions will amplify this exposure. Prioritise Domain 1 gaps before committing to any major purchase.

Yes = 2 points

Partially = 1 point

No = 0 points

My Domain 1 Score ____ / 16

Cloud Cost and Waste

Cloud spend is the fastest-growing and least-visible cost item in most enterprise IT budgets. Unlike hardware, cloud costs scale with usage – and with organisational complexity, unused resources, and poor tagging hygiene. Most organisations carry between 20 and 35 per cent avoidable cloud waste at any given time, and EOFY is one of the few natural forcing functions that motivates a genuine clean-up. This domain assesses whether your organisation has the visibility and governance to identify and eliminate cloud waste before it rolls into FY27.

#	Question	Yes	Partially	No
1	Do you have a current, complete inventory of cloud resources across all environments – production, development, staging, and any shadow accounts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Are cloud resources tagged consistently with owner, project, and cost centre – and is tag compliance actively enforced rather than aspirational?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Is there a defined, documented process for identifying and decommissioning idle or unused cloud resources – with a named owner accountable for executing it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Has your committed spend (reserved instances, savings plans, committed use discounts) been reviewed and optimised in the last six months?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Are cloud costs reported to a named accountable owner at least monthly, with line-item visibility by environment and project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Has your reserved instance or savings plan coverage been reviewed and right-sized for FY27 workload projections – not just renewed at current levels?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	If you operate across multiple cloud providers or accounts, do you have a single, unified cost visibility tool that covers all environments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Can you identify, by name, your organisation's top five cloud cost drivers today – without having to pull a report or wait for the next billing cycle?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Domain Scoring

Score	Indicator	What it Means
13-16	Strong	Your cloud cost governance is mature. The Partially answers will point to optimisation opportunities rather than structural exposure. Use this domain's findings to inform your FY27 reserved capacity decisions.
8-12	Developing	There are meaningful gaps in cloud cost visibility or governance. The No answers represent avoidable spend that will recur in FY27 if not addressed now.
0-7	At Risk	Your organisation lacks the visibility to manage cloud spend confidently. The waste already accumulating in your environment will compound in FY27 without structural intervention.

Yes = 2 points

Partially = 1 point

No = 0 points

My Domain 2 Score ____ / 16

Software Licensing and Asset Management

Most organisations simultaneously overpay for software they do not fully use and underestimate the risk of software they use without a valid licence. The pre-EOFY period is when enterprise agreement renewals, true-up obligations, and auto-renewal clauses collide – and when organisations without clean asset visibility face the highest exposure to both cost blowout and compliance risk. This domain assesses whether your organisation has the visibility to manage its licence estate accurately going into EOFY renewal season.

#	Question	Yes	Partially	No
1	Does your organisation maintain a current software asset register that is actively maintained – not a spreadsheet last updated at the previous audit?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Have licence entitlements been reconciled against actual usage in the last twelve months, with evidence of the reconciliation documented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Are auto-renewal clauses across your software contracts actively tracked, with review triggers set in advance of each renewal date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Have all end-of-life software products in your environment been identified, and is there a documented remediation plan with a named owner for each?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Has your organisation assessed its exposure to a software vendor audit in the last twelve months – including your position under any enterprise agreements where audit rights exist?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Are true-up obligations under your enterprise agreements understood, quantified, and budgeted for in FY27 – or are they currently estimated or unknown?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Has shadow IT – software purchased or used outside IT governance – been assessed, catalogued, and either brought into governance or formally decommissioned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Is security patching status tracked for all licensed software in your environment, including third-party applications and embedded software components?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Domain Scoring

Score	Indicator	What it Means
13-16	Strong	Your software asset management is well-controlled. Focus the Partially answers on any auto-renewal exposure and true-up obligations before June 30.
8-12	Developing	There are licence estate gaps that carry both financial and compliance risk. The No answers are your highest priority – particularly true-up obligations and audit exposure.
0-7	At Risk	Your organisation does not have the visibility to manage its software licence estate confidently. This creates financial exposure (unknown true-ups, auto-renewals, and unused licences) and security risk (unpatched and unsupported software).

Yes = 2 points

Partially = 1 point

No = 0 points

My Domain 3 Score ____ / 16

Deferral Debt Assessment

Every deferred technology decision has a cost – financial, operational, and security. The question is whether that cost is known, accepted, and managed, or whether it is simply accumulating by default. EOFY is one of the most natural moments to distinguish between decisions that are genuinely strategic deferrals and decisions that have been deferred because they are difficult, underfunded, or uncomfortable. This domain asks you to assess your organisation's deferral list honestly and identify which items are carrying compounding cost into FY27.

#	Question	Yes	Partially	No
1	Does your organisation maintain a documented list of deferred technology decisions, with the rationale for deferral recorded for each?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Have deferred decisions been assessed for their compounding security exposure – not just their financial cost – and is that assessment documented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Has the cost of deferral been explicitly estimated for your highest-risk deferrals – including the cost of remediation, incident response, or emergency replacement if the deferred item fails?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Have you identified whether any deferred decisions involve systems that are currently operating end-of-life or without active vendor support?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Have deferred security investments been explicitly reviewed and signed off by the CISO – not just noted as deferred in a broader planning document?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	For each material deferred decision, have the conditions under which the deferral would be reversed been explicitly defined – so the trigger is known in advance rather than decided under pressure?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Are your highest-risk deferred technology decisions recorded on the organisation's formal risk register, with an assigned risk owner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Does the board or audit committee have visibility of the organisation's highest-risk technology deferrals – including the estimated cost and security exposure attached to each?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Domain Scoring

Score	Indicator	What it Means
13-16	Strong	Your deferral list is well-governed. The Partially answers will likely point to documentation gaps or escalation gaps rather than unmanaged risk.
8-12	Developing	There are deferred decisions in your environment that are not well-governed. The No answers represent the items most likely to surface as incidents, budget blowouts, or audit findings in FY27.
0-7	At Risk	Your deferral list is accumulating compounding risk without adequate oversight or documented rationale. At least some of these deferrals are likely costing the organisation money or creating security exposure right now.

Yes = 2 points Partially = 1 point No = 0 points

My Domain 4 Score ____ / 16

Strategic Investment Readiness

EOFY is not only a time to cut and consolidate – it is an opportunity to make deliberate investments that will compound in FY27. The organisations that extract the most value from technology investment are typically not the ones that spend the most: they are the ones that align investment to specific business outcomes, secure executive sponsorship before the financial year begins, and have the internal capacity to execute. This domain assesses whether your organisation is approaching FY27 with a clear strategic technology investment thesis or carrying the same priorities forward by default.

#	Question	Yes	Partially	No
1	Does your organisation have a defined technology investment priority for FY27 that goes beyond maintenance, refresh, and compliance obligations – something that represents a deliberate strategic choice?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Have your strategic technology investments been assessed for their compounding return profile over two to three years – not just their immediate ROI in year one?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Is there documented alignment between your CISO and CTO (or equivalent roles) on the organisation's top security capability investment for FY27?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Does at least one strategic technology initiative in FY27 have named executive sponsorship at board or CFO level – not just approval, but active sponsorship?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Has your organisation assessed its technology capability position relative to peers or competitors in your sector in the last twelve months?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Have your planned FY27 technology investments been mapped to specific, named business outcomes – rather than to technology capability improvements in isolation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Does your technology team have the skills, vendor relationships, and budget headroom to execute your planned FY27 strategic investment – or are there known capacity gaps that have not yet been addressed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Is there a defined, measurable success metric for your organisation's primary FY27 technology investment that is not purely financial – one that the business would recognise as meaningful?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Domain Scoring

Score	Indicator	What it Means
13-16	Strong	Your cloud cost governance is mature. The Partially answers will point to optimisation opportunities rather than structural exposure. Use this domain's findings to inform your FY27 reserved capacity decisions.
8-12	Developing	There are meaningful gaps in cloud cost visibility or governance. The No answers represent avoidable spend that will recur in FY27 if not addressed now.
0-7	At Risk	Your organisation lacks the visibility to manage cloud spend confidently. The waste already accumulating in your environment will compound in FY27 without structural intervention.

Yes = 2 points

Partially = 1 point

No = 0 points

My Domain Score ____ / 16

Summary Scoring Table

Summary Scoring Table

Enter your domain scores below for an overall picture of your organisation's pre-EOFY technology position.

#	Domain	Your Score	Indicator
1	Procurement Integrity	/16	
2	Cloud Cost and Waste	/16	
3	Software Licensing and Asset Management	/16	
4	Deferral Debt Assessment	/16	
5	Strategic Investment Readiness	/16	
	Total	/80	

Overall Maturity Indicator

Total Score	Indicator	What it Means
65-80	Spend Sharp	Your organisation is well-positioned for EOFY and FY27. Focus on the Partially answers across your lowest-scoring domains as your final pre-EOFY priorities.
40-64	Developing	There are material gaps across multiple domains. Use the domain scores to prioritise where to focus your remaining EOFY effort – start with the lowest-scoring domains and the No answers within them.
0-39	At Risk	Your organisation is carrying significant financial and security exposure into FY27. Consider engaging an independent advisor before June 30 to prioritise and sequence the gaps this checklist has surfaced.

Closing Guidance

An honest score in the At Risk or Developing range is not unusual. Most organisations have gaps across at least two or three of these domains – and the value of this assessment is in identifying them before EOFY rather than discovering them through an incident, an audit finding, or a budget blowout in FY27.

Two practical next steps: first, use your domain scores to prioritise the pre-EOFY work. Start with your lowest-scoring domains and focus on the No answers within each – these represent the highest-concentration exposure. Second, for the gaps that require external support or independent validation, Orro can help. As an Australian-owned partner with Australian-based support escalation and 24/7 global operations capability, we work alongside technology teams to close procurement, cloud, licensing, and security gaps without displacing internal capability.

For procurement integrity and licence validation specifically, ValidPro® is Orro's structured procurement and licence assurance service – designed for exactly this kind of pre-EOFY review. Learn more at <https://orro.group/validpro/>.

For the broader strategic framework behind these domains, [The CFO's Technology ROI Guide: Making Smarter Decisions in the Final Quarter](#) is the companion asset to this checklist



Let's have a conversation

Learn more about what a partnership with Orro can do for your organisation. **Contact us today.**

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