

Turn Plans into Procurement



Thoughtful hardware evaluation and IT budget planning are essential to ensuring technology investments align with long-term business goals, especially in today's complex supply chain and tariff environment. Many businesses find themselves making these essential, impactful business decisions reactively and under budgetary pressure because they lack a long-term IT roadmap and the time and expertise to make good selections. Here are key tips for avoiding this situation.

Step-by-Step Guide: Hardware Evaluation + IT Budget Planning

1

Define Business Objectives and Growth Plans

Begin by aligning IT needs with business goals. Are you expanding to new locations? Hiring staff? Adopting new platforms? Hardware must support your vision. Work with your MSP to plot all potential expansion and hiring events, as well as new product lines or additional markets, before thinking through what technology needs to be addressed.

- Identify strategic initiatives
- Forecast future needs (12–36 months)
- Prioritize hardware investments that drive performance and scalability



Use a consultative planning session with your trusted MSP to guide this alignment and supply insights in terms of the role of emerging technology on initiatives.

2

Conduct a Full Inventory and Lifecycle Assessment

Map out all hardware assets, including:

- Desktops, laptops, servers, network gear, peripherals
- Purchase dates, warranties, and support status
- Operating system versions (e.g., devices nearing October 2025 Windows 10 end-of-support)

Use this data to:

- Identify at-risk or end-of-life equipment
- Prioritize refresh cycles
- Avoid over-licensing or under-utilization



Exigent's Assurance Managed Services and The Exigent Method proactively guide lifecycle and compatibility decisions.

3

Evaluate Compatibility and Compliance

Assess whether your existing hardware meets upcoming software or compliance requirements.

- Can your devices run Windows 11?
- Are encryption and endpoint protection solutions fully supported?
- Do systems align with industry regulations (HIPAA, CMMC, PCI-DSS, etc.)?

4 Analyze Performance vs. Cost

Balance performance needs with budget constraints. Consider:

- Total cost of ownership (TCO) over 3-5 years
- Energy efficiency and operating costs
- ROI from productivity gains or risk mitigation

Create user profiles (e.g., knowledge workers, power users, remote staff) to match hardware to performance needs.



Your MSP should have long-standing relationships that help with scenario planning and vendor management to reduce surprises.

5

Factor in External Risks (Tariffs, Supply Chain Delays, etc.)

Plan for potential price hikes or availability challenges. This can be challenging, especially since global economic factors can be unpredictable and evolve quickly. But do your homework and lean on your MSP for vendor insights that can help with planning.

- Build pricing buffers into your budget
- Order critical components early
- Leverage your MSP and their vendor partnerships for better insight

6

Create a Tiered IT Budget Plan

Organize your budget across three key areas, prioritizing for risk, strategic impact and funding.

Category	Inclusions
Run (Operational)	Maintenance, renewals, device support, etc.
Grow (Scalable)	Device upgrades, endpoint security, etc.
Transform (Strategic)	Cloud-ready solutions, emerging tech

7

Leverage Financing and Procurement Options

Explore cost-effective procurement strategies:

- Leasing vs. buying
- Volume discounts or partner promotions
- Government or SMB-specific incentives

8

Plan for Deployment, Support, and Disposal

Include full lifecycle support in your hardware plan:

- Deployment planning with minimal business disruption
- Ongoing endpoint management and monitoring
- Secure disposal or recycling of decommissioned assets

[Learn more about how Exigent can assist with planning and procurement](#)