

Finance Pack: Run/Grow/Transform Budget Worksheet

This worksheet helps Finance and IT leadership align upgrade and modernization costs under three budget categories — **Run**, **Grow**, and **Transform** — to clarify 2025’s temporary spike and 2026’s normalization.

Budget Categories

Category	Purpose	Examples
Run	Maintain and operate current systems	Support, patching, ESU fees
Grow	Expand business operations	New devices, licenses, or users
Transform	Modernize or upgrade systems	Migrating to supported versions, infrastructure overhaul

Use this model to show how 2025’s Transform projects temporarily raise spend while reducing future costs. By 2026, Run and Grow budgets stabilize as ESU fees and unsupported systems phase out.

Budget Worksheet

Category	2025 Budget (\$)	2026 Budget (\$)	Notes
Run			
Grow			
Transform			
Total			

Assumptions

How to Use

1. Review the 2025 and 2026 budget columns.
2. Enter your organization’s cost values in the Budget (\$) columns.
3. Use the Assumptions section to adjust context and align with your planning model.

4. Present the totals and year-over-year normalization trend to Finance leadership.

