

FREE SMALL-BUSINESS IT ASSESSMENT

Technology Readiness Checklist

A practical, high-level review of IT support, cybersecurity, cloud services, backup, business continuity and technology planning.

BUSINESS PROFILE

Start with the business context

Company

Prepared by

Date

Location

Team size

Current IT owner/provider

PRIMARY BUSINESS PRIORITY

- | | |
|---|---|
| ☐ Reliable day-to-day IT support | ☐ Cybersecurity and risk reduction |
| ☐ Microsoft 365 or cloud services | ☐ Backup and business recovery |
| ☐ Website performance or maintenance | ☐ AI or workflow automation |
| ☐ Technology planning and budgeting | ☐ Not sure yet |

SECURITY NOTICE

Keep this checklist high level. Never record passwords, verification codes, recovery codes, private keys, payment-card details, detailed network configurations or other confidential credentials.

Use this checklist for internal planning or before a conversation with a qualified technology provider. It is not a vulnerability scan, compliance assessment or substitute for professional advice.

What does the business rely on?

1. DEVICES AND SUPPORT

- | | |
|--|---|
| ☐ Current inventory of computers and mobile devices | ☐ Supported operating systems |
| ☐ Automatic security updates | ☐ Device encryption |
| ☐ Standard setup for new devices | ☐ Reliable technical support contact |

2. ACCOUNTS AND ACCESS

- | | |
|--|--|
| ☐ Named business administrator accounts | ☐ Multi-factor authentication |
| ☐ Business password manager | ☐ Access removed when roles change |
| ☐ Separate admin and daily-use accounts | ☐ Documented account recovery ownership |

3. EMAIL, CLOUD AND COLLABORATION

- | | |
|---|--|
| ☐ Business-managed email domain | ☐ Microsoft 365 or Google Workspace |
| ☐ Controlled external sharing | ☐ Approved cloud applications |
| ☐ Email anti-phishing protection | ☐ License and renewal inventory |

4. NETWORK AND REMOTE WORK

- | | |
|---|--|
| ☐ Business-grade router and firewall | ☐ Changed default administrator credentials |
| ☐ Separate guest wireless network | ☐ Secure remote access method |
| ☐ Current network equipment | ☐ Documented internet provider contacts |

5. WEBSITE AND DIGITAL ASSETS

- | | |
|---|---|
| ☐ Business owns domain registration | ☐ Current website software and plugins |
| ☐ HTTPS certificate active | ☐ Website backup available |
| ☐ Controlled social-media administration | ☐ Recovery contacts documented |

Can the business prevent, respond and recover?

6. CYBERSECURITY PRACTICES

- | | |
|--|---|
| ☐ Endpoint protection on business devices | ☐ Employee security awareness training |
| ☐ Phishing-reporting process | ☐ Security alerts reviewed |
| ☐ Sensitive data locations identified | ☐ Cyber incident contact list |

7. BACKUP AND BUSINESS RECOVERY

- | | |
|--|--|
| ☐ Critical data included in backups | ☐ Backup copies protected from daily accounts |
| ☐ Restoration tested successfully | ☐ Recovery time expectations documented |
| ☐ Critical systems prioritized | ☐ Backup failures monitored |

8. EMPLOYEE ONBOARDING AND OFFBOARDING

- | | |
|--|---|
| ☐ Access approved before assignment | ☐ Standard onboarding checklist |
| ☐ Business devices recorded | ☐ Access promptly removed at departure |
| ☐ Files and ownership transferred | ☐ Shared credentials changed when required |

Notes and immediate concerns

1

2

3

4

Turn findings into an accountable plan

9. VENDORS, CONTRACTS AND COSTS

- | | |
|---|--|
| ☐ Technology vendors and contacts listed | ☐ Renewal and cancellation dates recorded |
| ☐ License counts reviewed | ☐ Overlapping services identified |
| ☐ Support responsibilities documented | ☐ Technology spending baseline available |

10. ROADMAP AND GOVERNANCE

- | | |
|--|---|
| ☐ Technology priorities connected to business goals | ☐ Aging systems and end-of-support dates known |
| ☐ 12-month improvement roadmap | ☐ Named business and technical owners |
| ☐ Quarterly progress review | ☐ Contingency reserve for urgent changes |

SIMPLE REVIEW

Count the items checked above. Use the result to guide discussion, not as a security rating.

Mostly checked

Confirm that controls are documented, tested and consistently managed.

Some checked

Prioritize the most important gaps around accounts, devices, backup and recovery.

Few checked / many unknown

Begin with an inventory and a focused professional review before selecting new tools.

TOP THREE NEXT ACTIONS

1

2

3

READY FOR A HUMAN REVIEW?

Complete the online Free IT Assessment:
commzztech.com/free-it-assessment.html
Or email info@CommzzTech.com.