

The 10-Point **IT & Security** Checklist for Small Businesses

A plain-English checklist to find the gaps in your technology before they cost you money, time or customers.

How to use this checklist

Tick each box you can honestly answer “yes” to. Every box left empty is a gap worth closing. Start with items 1–4, which give the biggest protection for the least effort.

1 Turn on multi-factor authentication (MFA)

- ☐ Enabled on email, banking, cloud and admin accounts
 - ☐ Authenticator app or security key preferred over SMS codes
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2 Use a password manager

- ☐ Every account has a unique, strong password
 - ☐ No passwords kept in shared spreadsheets, notes or chat
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3 Back up your data and test the restore

- ☐ 3 copies of your data, on 2 different media, with 1 stored offsite
 - ☐ You have actually restored a backup in the last 3 months
 - ☐ Backups cannot be changed or deleted by a compromised laptop
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4 Keep everything updated

- ☐ Operating systems, apps, routers and firmware are patched
 - ☐ Website platform, themes and plugins are kept current
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5 Protect every device

- ☐ Security software installed and managed on all computers
 - ☐ Disk encryption, screen lock and remote-wipe on laptops and phones
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6 Limit who can access what

- ☐ Staff only have access to what their role needs
- ☐ Accounts of former staff are disabled the same day they leave
- ☐ Admin accounts are reviewed at least twice a year

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Train your team

- ☐ Staff can spot phishing emails and fake invoices
- ☐ Everyone knows how, and to whom, to report something suspicious
- ☐ Refresher training happens at least once a year

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Secure your network and Wi-Fi

- ☐ Default router and device passwords have been changed
- ☐ Guest Wi-Fi is separate from the business network
- ☐ Remote staff connect through a VPN or a secure cloud service

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Have an incident response plan

- ☐ A written list of who to call and what to do first
- ☐ You know your legal duties if customer data is exposed
- ☐ Cyber insurance has been considered and reviewed

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Know what you own and what it costs

- ☐ A current list of devices, software and subscriptions
- ☐ Unused licenses and duplicate tools have been removed
- ☐ IT spend is reviewed against business goals every year

Found gaps? We can help.

Book a **free 30-minute call** and we'll walk through your results and send a custom proposal within 24 hours.

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This checklist is general guidance for small businesses. It is not legal, insurance or compliance advice, and following it does not guarantee security or compliance with any specific regulation.