

# Technology Audit Checklist

## BIG-PICTURE FRAMEWORK

- › The last time you hired a staff member how days before they started, did you contact technology provider X number of days before, the day they started or several days afterward?
- › Have you ever purchased a book of business, if so did you let your technology provider X number of days before, the day the books arrived or several days afterward?
- › When technology lets you down, do you tend to lose efficiencies?

## OVERHAUL

- › When was the last time you updated your security processes more specific, do you have any security processes?
- › When was the last time your staff had security awareness training? Have you ever done a security awareness training, if so, how long ago was it?
- › Do you have a policy and procedure in case of a complete network outage, if so when was the last time you updated it?

## TECHNOLOGY ADVANCEMENT PLAN

- › Do have a system in place to manage your client's information in one place, if so is your team using it efficiently?
- › Do you have a process in place to communicate with your clients and potential prospects?
- › Do you have technology in place to increase your team productivity and efficiency?