

Small Business IT Preparedness Checklist.

SEPTEMBER 2026
NATIONAL PREPAREDNESS MONTH

Seven things worth having in place.

A quick self-check for small business owners. Nothing here requires an IT background. Read through the list, mark what's in place, and note what's not. Anything unchecked is a good place to start a conversation, whether that's with your team, your IT partner, or me. The back of this sheet is a reference worth keeping handy either way.

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| 01 | A backup you have tested recently.
The backup that ran last week might not restore next week, and you wouldn't know until you needed it. A common rule is 3-2-1: three copies of important data, on two types of storage, one of them offsite. If nobody has restored a file lately, a quick test is worth the time. | ☐ |
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| 02 | A written list of the systems your business runs on.
When something breaks in a hurry, the people helping you fix it need to know what you use. One page is enough. The Know Your Providers reference on the back of this sheet covers most of what belongs on that list. | ☐ |
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| 03 | A way to keep working when the office is not available.
If the office is closed for the day, whether it is a storm, an outage, or something worse, your team ends up working from home or somewhere else. The question is whether they still have what they need to keep working. Files, email, phones. | ☐ |
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| 04 | Two-factor authentication on the accounts that matter.
Anywhere someone could cause a financial loss or damage your reputation with a stolen password is worth an extra step. Email, banking, payroll, accounting, your CRM, and whoever manages your domain. Two-factor means a guessed or stolen password alone doesn't get them in. | ☐ |
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| 05 | Passwords in a manager, not on paper or in your head.
A password manager remembers your logins so you do not have to, and lets you share access with your team without emailing passwords around. Anything you actually use is better than a sticky note on the back of a keyboard. | ☐ |
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| 06 | Software kept up to date across your team.
Updates fix the security problems that make the news. Operating systems, browsers, office software, and network gear all need someone keeping them up to date. That can be you, a staff member, or someone outside. Just needs to be someone. | ☐ |
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| 07 | Someone accountable for all of the above.
In most small businesses, the gap is not any one missing piece. It is that nobody is looking at the whole picture. Could be you, could be a staff member, could be an outside partner. Whoever it is, someone has to own it. | ☐ |
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- Any of these give you pause?
- Happy to talk any of this through. No agenda, no pitch. Reach out anytime.
A short conversation is often all it takes to know where you stand.
- Cascadia Technology Advisors
(503) 610-6780
cta-it.com/ready
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Know Your Providers.

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A quick reference for the day something breaks.

When the internet is down or someone can't get into email, having the right vendor and number in one place saves a lot of scrambling. Keep one at the office, one at home, and pass a copy to anyone else on your team who might need it.

	PROVIDER	ACCT #	PHONE	PORTAL / URL	REP
Internet Service Provider					
Phone Service					
Email Provider					
Shared Files / Storage SharePoint, OneDrive, Drive, etc.					
Website Hosting					
Domain Registrar					
Card Processing / POS					
Line-of-Business App #1 Your main day-to-day application					
Line-of-Business App #2 Second most-used tool					
Line-of-Business App #3 Third most-used tool					
IT Support Partner Who you call when tech breaks					

Not sure who does what?

That is a good reason to call. Happy to help you sort out who owns what, no strings attached.

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