

BUSINESS-FOCUSED PLANNING RESOURCE

TECHNOLOGY RISK & OPPORTUNITY CHECKLIST

A connected review of the systems, facilities, workflows, vendors, and decisions that shape daily operations.

HOW TO USE IT

Answer each question Yes, No, or Unsure. Treat every No or Unsure as a conversation starter, not an automatic purchasing decision. Then choose the three items with the greatest consequence for operations, safety, customers, employees, compliance, or growth.

YES	A known strength to maintain
NO	A confirmed gap to evaluate
UNSURE	A visibility or ownership gap to clarify

Planning aid only. This checklist is not a security audit, compliance certification, engineering review, legal opinion, or promise that every risk has been identified.

Start with what could interrupt the business.

01 BUSINESS CONTINUITY AND RECOVERY

Can leadership name the systems, facilities, vendors, and data required to keep the business operating?	☐ YES ☐ NO ☐ UNSURE
Are recovery priorities, acceptable downtime, and responsible roles documented and understood?	☐ YES ☐ NO ☐ UNSURE
Are backups protected separately from production systems and tested through actual restores?	☐ YES ☐ NO ☐ UNSURE
Could the company communicate and operate through an internet, cloud, power, or building disruption?	☐ YES ☐ NO ☐ UNSURE

02 CYBERSECURITY AND COMPLIANCE

Is multifactor authentication required for email, remote access, administrative accounts, and critical applications?	☐ YES ☐ NO ☐ UNSURE
Are devices, software, access rights, vulnerabilities, and security alerts reviewed on a defined schedule?	☐ YES ☐ NO ☐ UNSURE
Can the company produce policies, inventories, evidence, and ownership records for customer, insurer, or audit requests?	☐ YES ☐ NO ☐ UNSURE
Are incident roles, escalation contacts, decision authority, and communications rehearsed before an event?	☐ YES ☐ NO ☐ UNSURE

03 IT OPERATIONS AND SUPPORT

Do employees have a clear support path with visible ownership, priorities, escalation, and follow-through?	☐ YES ☐ NO ☐ UNSURE
Are recurring issues analyzed and removed instead of repeatedly closed as separate tickets?	☐ YES ☐ NO ☐ UNSURE
Are computers standardized, inventoried, patched, protected, and managed from onboarding through disposal?	☐ YES ☐ NO ☐ UNSURE
Does leadership receive plain-language reporting on service quality, risk, lifecycle, projects, and spending?	☐ YES ☐ NO ☐ UNSURE

04 CLOUD, IDENTITY, AND COLLABORATION

Are Microsoft 365, cloud applications, file access, sharing, retention, and administrative roles intentionally governed?	☐ YES ☐ NO ☐ UNSURE
Can access be added, changed, and removed reliably when employees, contractors, or responsibilities change?	☐ YES ☐ NO ☐ UNSURE
Is cloud data protected by recovery and retention plans appropriate to the business requirement?	☐ YES ☐ NO ☐ UNSURE
Are licenses, unused accounts, duplicate tools, and unmanaged applications reviewed for cost and risk?	☐ YES ☐ NO ☐ UNSURE

05 NETWORK, CONNECTIVITY, AND CABLING

Are network diagrams, equipment inventories, configurations, warranties, carriers, and support contacts current?	☐ YES ☐ NO ☐ UNSURE
Do Wi-Fi, switching, firewalls, internet, voice, and remote access meet performance and security needs?	☐ YES ☐ NO ☐ UNSURE
Are cabling, labeling, testing, closets, power, cooling, and physical access ready for growth and troubleshooting?	☐ YES ☐ NO ☐ UNSURE
Do critical locations have a realistic connectivity backup or continuity plan?	☐ YES ☐ NO ☐ UNSURE

Look for visibility gaps and useful opportunities.

06 PHYSICAL SECURITY

Do camera, access-control, intrusion, and intercom systems match the actual people, areas, assets, and risks?	☐ YES ☐ NO ☐ UNSURE
Can authorized staff retrieve clear, time-synchronized evidence quickly after an incident?	☐ YES ☐ NO ☐ UNSURE
Are permissions, retention, privacy, maintenance, cabling, network, storage, and lifecycle responsibilities defined?	☐ YES ☐ NO ☐ UNSURE
Are visitor, credential, exception, emergency, and former-employee access processes consistent?	☐ YES ☐ NO ☐ UNSURE

07 IOT AND FACILITY INTELLIGENCE

Would earlier notice of leaks, temperature, humidity, air quality, power, occupancy, fill levels, or equipment conditions reduce risk?	☐ YES ☐ NO ☐ UNSURE
Are alert thresholds, recipients, escalation, response instructions, and after-action review clearly assigned?	☐ YES ☐ NO ☐ UNSURE
Can sensor data be connected to work orders, reporting, compliance evidence, or operating decisions?	☐ YES ☐ NO ☐ UNSURE
Are gateways, connectivity, batteries, firmware, placement, documentation, and device lifecycle owned after installation?	☐ YES ☐ NO ☐ UNSURE

08 AI AUTOMATION AND GOVERNANCE

Which repetitive, rules-based workflows consume the most time, create delays, or require duplicate data entry?	☐ YES ☐ NO ☐ UNSURE
Are the process, data, permissions, exceptions, success measures, and responsible owner clear before automation begins?	☐ YES ☐ NO ☐ UNSURE
Will a person review high-impact decisions and unusual cases rather than trusting automation blindly?	☐ YES ☐ NO ☐ UNSURE
Can the business measure time saved, errors reduced, response improved, or another defined outcome?	☐ YES ☐ NO ☐ UNSURE

09 STRATEGY, VENDORS, AND LIFECYCLE

Does leadership maintain a prioritized technology roadmap tied to business goals, risk, budget, and timing?	☐ YES ☐ NO ☐ UNSURE
Are contracts, renewals, ownership, support obligations, dependencies, and exit requirements visible?	☐ YES ☐ NO ☐ UNSURE
Are aging systems, facilities, licenses, warranties, projects, and technical debt included in financial planning?	☐ YES ☐ NO ☐ UNSURE
Is one accountable role responsible for connecting IT, facilities, security, automation, vendors, and leadership decisions?	☐ YES ☐ NO ☐ UNSURE

Choose the smallest sensible next step.

Select the three answers that carry the greatest business consequence. Describe the impact in plain language before discussing products, vendors, or projects.

PRIORITY 1	
Risk or opportunity	
Business consequence if ignored	
Owner and next decision	

PRIORITY 2	
Risk or opportunity	
Business consequence if ignored	
Owner and next decision	

PRIORITY 3	
Risk or opportunity	
Business consequence if ignored	
Owner and next decision	

READY FOR A SECOND SET OF EYES?

Schedule a complimentary 30-minute Technology Risk & Opportunity Review.

connexiom.com/schedule | Solutions@connexiom.com | (770) 580-0440