CHIMBLY CONSULTANTS LLC
## KEYS TO YOUR MODERN BUSINESS

Small Business Technology Organizer

Modern technology is complex and can be overwhelming. Chimbly Consultants developed this tool to aid your understanding of technology behind your business.

This Business Technology Organizer:

- Guides you through IT features common to small, modern businesses
- Will improve your understanding of your overall IT infrastructure
- Offers a resource for when problems inevitably arise
- May identify areas where your business could benefit from best practices or where you need to comply with your industry's regulations

At Chimbly, we approach small businesses holistically - while we're a tech business, we know that it's people who really matter.

If you identify a technological frustration, need, or area of concern, Chimbly Consultants can tailor solutions to your specific business needs. Call or visit our website for a free consultation.
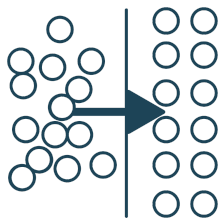
Chimbly Consultants, LLC
www.chimbly.com
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Small Business Technology Organizer

Business Name:	
Business Address:	
Owner/Contact:	
Mobile Phone:	
Emergency Contact & Phone:	

# of Full Time Staff _____   # of Part-Time Staff _____   # of Remote Staff _____

Tech Support

Who do you rely on for prevention, troubleshooting, and recovery?

Support Name:	
Phone:	
Email:	

Encryption

Many industries now require encryption on all mobile devices containing customer info.
How do you recover that information when a Windows update fails or you need to move the disk drive to another machine?

Person Responsible:	
Password Location:	

Computer & Network Hardware

What equipment do you use?

Network Equipment

☐ Modem & Router   ☐ Rented modem/gateway/router

☐ Rented modem, owned Router

Computers & Servers

☐ Servers Onsite # _____   ☐ NAS onsite _____

☐ Remote servers / Virtual Machines _____

☐ Desktops # _____   ☐ Laptops # _____

☐ Windows 7   ☐ Windows 10   ☐ Linux [Distro(s)]: _____

☐ OS X   ☐ Others: _____

Print, Scan & Fax:

☐ MFC   ☐ Sheet fed Scanner   ☐ Workgroup Copier/scanner

Website

Does your business have a functional and customer centric website?
Who do you contact if you need to change the website or if you have problems?

Website Address:	
Support Name:	
Email:	
Phone:	

Email

Do your emails come from your website.com address or are you using a public email service?
Do you trust your spam protection to be robust, reliable and accurate?

Email Provider:	
Support:	
Admin Email:	
Recovery Email:	

2-Factor Authentication for Email

This security feature provides dramatically better protection for your account. Are you using it?

☐ None

☐ Authenticator App: _____

☐ Email _____

☐ Backup Keys (Where): _____

☐ Phone Number(s): _____

☐ USB Key / RSA Key / YUBI key

Domain Name

Who is responsible for keeping this critical business resource up and running?

Domain Name(s):	
Email associated with Domain(s):	
Registrar(s):	
Who handles billing and registration for Registrar(s)?	

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Social Media

You may choose not to use all of the social networks, but it's worth being aware of the options and be deliberate in choosing how you'll present your business online.

☐ Facebook (Personal)   ☐ Facebook Business Page - Managers: _____

☐ LinkedIn (Personal)   ☐ LinkedIn Business Page - Managers: _____

☐ Twitter (personal)   ☐ Twitter Business Page - Managers: _____

☐ Pinterest   ☐ Instagram   ☐ Yelp Claimed   ☐ Google Business (Maps) Claimed

☐ Industry specific review sites (e.g. Avvo for lawyers, Health Grades for doctors, etc.)

Desired frequency of posts?

☐ Rarely   ☐ Monthly   ☐ Weekly   ☐ Daily   ☐ _____

Who monitors and responds to reviews?	
Email(s) used to register and monitor social media accounts:	

Cloud Storage / File Sharing

How do your securely share files within your organization? With customers?

☐ Google Drive / G Suite   ☐ OneDrive   ☐ Dropbox   ☐ In-House Server

Other/Notes:

Backups

Who rotates your local backups? Do you have offsite backups?

Local backups? Remote backups?	
Admin Email:	
Locations of recovery keys, passwords:	

Software and Subscriptions

What software powers your business? How do you contact the provider when needed?

Service	Billing Anniversary	Account Number	Support Contact Info

Updates

Who is responsible for updating your router, computers, and other equipment?

Responsible Party:	
Frequency of update checks:	

CRM (Customer Relationship Manager)

How do you store customer and potential customer data? Is your CRM being used effectively?

Name of CRM:	
Admin:	
Support Info:	

Internet Service Provider

Who do you call when your internet goes down?

Internet Provider:	
Tech Support Contact:	
Account Number/ Passphrase:	
Account Email:	

Office Phone System

Do you have a phone system in place that will grow seamlessly with your business?
Who do you contact if something goes wrong?

Type of phone system:
☐ Traditional Phone Line   ☐ VoIP   ☐ VoIP From Internet Provider

Phone Provider:	
Tech Support Contact:	
Account Number:	
Account Email:	

Cell Phones

Does your business provide its employees with cell phones? How do you ensure critical data stays safe? Are all phones with customer emails or other data encrypted?

Cell Phone Provider:	
Tech Support Contact:	
Account Number:	
Account Email:	
Company Policies:	

Password Management System

Do you have a robust password policy? Are your passwords different for each service you use?

What password manager do you use?

☐ LastPass   ☐ BitWarden   ☐ Dashlane   ☐ KeePass   ☐ RoboForm

☐ 1Password   ☐ Keeper   ☐ Zoho Vault   ☐ Other: _____

Other, discouraged methods of password management:

☐ Spreadsheet   ☐ Paper   ☐ Word Document   ☐ Stored as Contacts

Where is your master password backed up?	
Who will maintain critical services if you are incapacitated?	
What method do you use to share passwords safely with employees?	

Want Support? Contact us at (773) 377-8455 or visit chimbly.com for a free consultation!