

# Quarterly IT Review, One Page

Ninety minutes, four times a year. Most of what goes wrong in small business IT is something that was fine at setup and drifted.

Quarter: \_\_\_\_\_ Completed by: \_\_\_\_\_ Date: \_\_\_\_\_

## Security

- ☐ Administrator access reviewed, and anything unnecessary removed
- ☐ Multi-factor confirmed enforced on every account, including new starters
- ☐ Anyone who left had their access fully removed, and it was verified rather than assumed
- ☐ Endpoint protection reporting on every device, with no machines missing

## Backups

- ☐ A restore tested, and the date logged
- ☐ Backup scope checked against anything new since last quarter
- ☐ Backup failure alerts confirmed to be reaching a human

## Devices

- ☐ Inventory updated, including anything bought or retired
- ☐ Machines approaching replacement age identified and budgeted
- ☐ Patching confirmed current across the fleet

## Money

- ☐ Subscriptions reviewed. Anything nobody uses, cancelled
- ☐ Licences matched to actual headcount, not headcount from a year ago
- ☐ Renewal dates for the next two quarters scheduled

## Documentation

- ☐ Systems document updated
- ☐ Incident response contacts still correct
- ☐ Anything learned this quarter written down

## Three questions for the owner

1. What broke this quarter, and was the cause ever actually fixed?
2. What did somebody complain about more than twice?
3. What are we still doing by hand that we said we would automate?

## Next review due

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