

IT Checklist for the End of Year

When a new year is about to roll around, it's a great time to reassess your IT practices. It's always better to be *over*prepared when it comes to your online security, data storage, and all things IT! Review the items, checking off tasks as you complete them.

- ☐ **Backup data** – As an industry standard, keep three copies of data in two different storage locations and keep one copy in an off-site location. This is 3-2-1 backup strategy.
- ☐ **Backup contacts** – Make sure you have records of your contacts, then ensure you have them stored in a separate location. If you use a CRM, export information into a spreadsheet or .csv. Keep the copy in a *secure*, separate digital location.
- ☐ **Update passwords** – Recycling passwords weakens overall security. If there are too many to easily manage, it might be time to think about implementing a secure password management application.
- ☐ **Clean up hard drive** – Removing redundant or irrelevant files streamlines processes and increases productivity. Delete files that are outdated or won't be needed again.
- ☐ **Reassess hardware + software** – While it's best to be assessing your technology footprint throughout the year, now is a great time to ask if the hardware/software best fits your business needs. Also, is there something out there with better features, costs less, or is easier to use?
- ☐ **Document standard operating procedures** – Creating a system of reference for employees saves future training time and gives structure in shifting situations.
- ☐ **Install updates** – Implement the newest features and capabilities to keep business running in peak form.
- ☐ **Evaluate your website** – Consider updating your look and pages to stay on top of design trends and stay relevant in a changing market.
- ☐ **Assess cybersecurity** – Test your systems for weaknesses, consider any compromised passwords, and eliminate vulnerabilities.
- ☐ **Appraise automation opportunities** – Consider tedious standard procedures, clunky departmental workflows, and the ways ai/automation's growing capabilities may help.