This checkup helps you understand your technology and how to improve it. Don't worry if you don't know all the answers! Just do your best and ask for help if you need it.

Here's how to fill it out:

1. **Read each question carefully.** If you're not sure what it means, ask someone who knows about technology, or contact us! We're here to help.
2. **Check the boxes that apply to you.** If a question doesn't apply to your business, just skip it.
3. **Be honest!** The more accurate your answers, the better we can understand your needs.
4. **Ask your employees for their input.** They use your technology every day, so they might have valuable insights.
5. **Don't stress!** This is just a tool to help you. There are no wrong answers.

Need Help?

If you have any questions while filling out the checkup, don't hesitate to reach out! You can:

- **Contact us directly:** 385-250-2200 - info@coqui.cloud
- **Schedule a free consultation**

We're happy to answer any questions and help you make the most of your technology.

Example:

Let's look at an example question:

- **Do you have antivirus software on all your computers and phones?**

Think about all the computers and phones in your business. If they all have antivirus software installed, you would check the box. If some of them don't have antivirus software, you would leave the box unchecked.

Remember:

- This checkup is for you. It's designed to help you understand your technology needs.
- Be open and honest in your answers.
- Ask for help if you need it. We're here to support you!
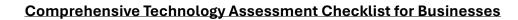
1. Inventory Hardware & Software

☐ List all computers (desktops, laptops, servers), mobile devices (smartphones, tablets), and other network-connected devices (printers, scanners, IoT devices).

 For each device, note:

☐ Manufacturer and model

☐ Operating System (version and edition)

☐ RAM and storage capacity

☐ Processor type and speed

☐ Age and condition

☐ Warranty status

☐ Create a comprehensive list of all software applications, including:

☐ Name and version

☐ Licensing information (type, number of licenses, expiration dates)

☐ Purpose and usage frequency

☐ Cloud-based or on-premise

☐ Document network infrastructure components:

☐ Routers, switches, firewalls

☐ Network topology (wired, wireless)

☐ Internet service provider (ISP) and bandwidth

☐ Cloud Services:

☐ Document all cloud services used (e.g., AWS, Azure, Google Cloud)

☐ Identify data storage locations (on-premise, cloud, hybrid)

☐ Assess cloud security measures and compliance (e.g., data encryption, access controls)

☐ Legacy Systems:

☐ Identify any outdated or unsupported hardware or software

☐ Assess the risks and costs associated with maintaining legacy systems

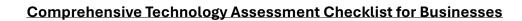☐ Explore options for migrating from legacy systems to modern solutions

2. Identify Pain Points & Inefficiencies

☐ Workflow & Productivity:

☐ What manual or repetitive tasks could be automated?

☐ Are there bottlenecks in your workflow due to technology limitations?

☐ Do your current systems support remote work effectively?

☐ Are employees experiencing downtime or slow performance that hinders productivity?

☐ Are there difficulties in accessing or sharing files and information?

☐ Communication & Collaboration:

☐ Are you struggling with effective communication or collaboration within your team?

☐ Do you have the right tools for video conferencing, instant messaging, and file sharing?

☐ Are there communication silos between departments?

☐ Data Management:

☐ Do you have trouble managing customer data or other critical business information?

☐ Is your data stored securely and backed up regularly?

☐ Do you have a system for data analysis and reporting?

☐ Security:

☐ Are there security concerns with your current systems?

☐ Have you experienced any security breaches or data loss incidents?

☐ Do you have a disaster recovery plan in place?

☐ Customer Experience:

☐ Does your technology enhance or hinder the customer experience?

☐ Are there opportunities to use technology to improve customer service and satisfaction?

☐ Business Processes:

☐ Are there any business processes that are hindered by technology limitations?

☐ Are there opportunities to streamline processes through automation or integration?

☐ Scalability:

☐ Can your current technology infrastructure support your future growth plans?

☐ Are your systems scalable to handle increased data volume and user demand?

☐ Compliance:

☐ Are you meeting all relevant industry regulations and compliance requirements (e.g., GDPR, HIPAA)?

☐ Are there any gaps in your compliance posture that need to be addressed?

3. Evaluate Existing Security Measures

☐ Endpoint Protection:

☐ Do you have antivirus and anti-malware software installed and updated on all devices?

☐ Is endpoint detection and response (EDR) in place?

☐ Network Security:

☐ Is your network protected by a robust firewall?

☐ Do you have intrusion detection/prevention systems (IDS/IPS) in place?

☐ Is your Wi-Fi network secure (WPA2/3 encryption)?

☐ Do you use a Virtual Private Network (VPN) for remote access?

☐ Data Protection:

☐ Do you have a comprehensive data backup and recovery plan in place?

☐ Are backups tested regularly?

☐ Is sensitive data encrypted?

☐ Access Control:

☐ Are passwords secure and regularly updated?

☐ Do you enforce multi-factor authentication (MFA) for critical systems?

☐ Do you have a system for managing user access and permissions?

☐ Security Policies & Training:

☐ Do you have a mobile device security policy?

☐ Are employees trained on cybersecurity best practices (phishing awareness, password security)?

☐ Do you have a data breach response plan?

☐ Vulnerability Management:

☐ Do you have a process for identifying and mitigating security vulnerabilities?

☐ Do you conduct regular security assessments and penetration testing?

☐ Incident Response:

☐ Do you have an incident response plan in place to handle security incidents?

☐ Do you have a system for logging and monitoring security events?

4. Analyze Budget & Resources

☐ What is your current IT budget?

☐ How much can you realistically invest in new technology or IT services?

☐ What are the potential costs of not upgrading your technology (e.g., lost productivity, security breaches, compliance fines)?

☐ Do you have any technical expertise in-house?

☐ What are your IT staffing needs?

☐ What is your timeline for implementing new technology solutions?

☐ Are there any financing options available for technology upgrades (leasing, subscriptions)?

☐ Return on Investment (ROI):

☐ How will you measure the ROI of your technology investments?

☐ What are the expected cost savings or revenue increases from technology improvements?

☐ Total Cost of Ownership (TCO):

☐ Consider the total cost of ownership for hardware, software, and IT services (including maintenance, support, and upgrades).

5. Define Technology Goals

☐ Business Objectives:

☐ How can technology help you achieve your overall business objectives?

☐ What specific business problems are you trying to solve with technology?

☐ Desired Outcomes:

☐ What do you hope to achieve by improving your technology (e.g., increased efficiency, improved security, better customer experience)?

☐ How will you measure the success of your technology improvements (KPIs)?

☐ Priorities:

☐ What are your priorities for technology implementation (e.g., security, efficiency, scalability, customer experience)?

☐ Future Growth:

☐ How will your technology needs evolve as your business grows?

☐ Are your technology solutions scalable to accommodate future growth?

☐ Innovation:

☐ How can technology be used to drive innovation and gain a competitive advantage?

☐ Are you exploring emerging technologies (e.g., AI, machine learning) to improve your business?

☐ Sustainability:

☐ Are there opportunities to use technology to reduce your environmental impact (e.g., energy efficiency, paperless office)?

Bonus Tip:

☐ Employee Feedback: Talk to your employees! Get their input on their workflow, technology needs, and pain points. Their insights can be invaluable in identifying areas for improvement and choosing the right solutions.

Additional Considerations:

☐ Disaster Recovery:

☐ Do you have a disaster recovery plan in place to ensure business continuity in the event of a major disruption?

☐ Do you have offsite backups and a plan for restoring data and systems?

☐ Change Management:

☐ Do you have a process for managing technology changes and upgrades?

☐ How do you minimize disruption to the business during technology implementations?