

Technology overview checklist

Not sure where to start? This list helps you sort out what matters most, so a first conversation focuses on your top priority instead of everything at once.

01 Which areas would you like to look at?

Internet, business phones, contact center, mobile, Microsoft 365 or email, cloud, cybersecurity, backup and disaster recovery, IT support, other.

02 How many locations and about how many employees do you have?

A rough count is fine.

03 Which one is the most pressing right now, and why?

A contract ending, rising costs, outages, growth, a security scare or a new project.

04 Are any technology contracts renewing in the next six months?

List what you know; "not sure" is a useful answer too.

05 Is a project coming up that we should plan around?

A move, a new office, an acquisition, a system change or a compliance deadline.

06 Who else would weigh in on a decision?

For example an owner, finance or an outside IT provider.

Rough answers are fine, and "not sure" is a useful answer. Please don't send account numbers, passwords or full bills; if we need to look at a contract, we'll arrange a safe way to share it.