



# Small Business Technology

## Technology Checklist For Small Businesses



Provided is a checklist for small businesses that will help serve as a guide for effective use of technology in the workplace.

### \_\_\_ Productivity Enhancement Applications/Accounting Package

Every business should use software tools to enhance its productivity, from the very basics (such as email and spreadsheet applications) to more robust ones such as integrated accounting packages and resource planning tools. One other key technology application tool that should be used is one to track business – orders, receivables, payables, etc.

### \_\_\_ Customer Database

At a minimum, your business should have a solid, updated database of customer contact information and emails. This is likely one of your most valuable assets. If you have a large number of customers, leads or contacts, consider using a CRM (customer relationship management) application.

### \_\_\_ Data Backup System/Procedures

It is imperative for a business that uses computers to have data backup systems (with encryption) and established procedures to ensure that backups are done regularly and consistently. Moreover, consider storing these files in at least two locations, with one being offsite (in case of fire, theft, flood, etc.).

And remember to implement security conditions with your backed-up data and tapes. Data and identify thieves are focusing now on acquiring data the “old fashioned” way – stealing it. All your digital assets can be stolen despite all your sophisticated efforts if an unencrypted tape or CD goes missing.

### \_\_\_ Business Email Account

Set up a business email account that, preferably, ties in with your company’s name or company’s web domain name. This way you will have greater recognition and credibility by receivers.

### \_\_\_ Web Site

A professional web site (even a single page site) with relevant content that properly positions and presents your company’s offerings or services is a necessary component for small businesses. If building and updating a website seem overwhelming or daunting, then consider either outsourcing this or using a template system or a content management tool.

### \_\_\_ Planning

From technology replacement cycle planning to breakdown/disaster contingency planning, a good technology plan can help keep your systems running so your business can keep on ticking. Businesses need to remember to keep their technology and computing hardware reliable and operational. It is generally recommended that a business consider a three-year replacement cycle for its hardware.

### \_\_\_ Broadband Connection

Small businesses should have either a DSL, cable, satellite or wireless high-speed Internet connection. Complement this with a sharing gateway or router, to make sure all workstations can be connected and on at the same time.

### Security Measures

Ensure that your company has and follows proper security measures, such as maintaining an updated operating system, and virus protection software, firewall, spyware protection, adware protection, etc. Security is a process, not a product. Also, ensure that an adequate encryption method is used to keep customer information (such as personal data or credit card numbers) safe and secure.

### e-Commerce/e-Procurement/On-line Order Taking

There are variety of tools that a business can use to make on-line purchases of goods and services (eBay, Alibaba, CDW, Staples, etc.) as well as on-line sales (eBay, Yahoo, etc.). Also there are many third-party applications that a business can use to provide for on-line order taking (with credit cards) or direct purchasing.

### Document Scanning/Imaging/Electronic Storage

Businesses today still use quite of bit of paper, and the best way to secure that paper, whether invoices, receipts, transcripts, reports, files, or records, is to scan these and store them electronically. There are a wide variety of tools to provide these directly to a business or as a service.

### Secure Remote Access

While not applicable to every businesses, more and more small businesses are benefiting from being able to access their files and applications remotely – either from home or on the road.

### Trusted Technology Consultant/Advisor

Having access to a technology or security consultant(s) will ensure that you can concentrate on your business – what you know best - while someone else spends time repairing, maintaining, securing or strategizing about technology solutions for your business – what they do best. However, the consultant who is good at upgrading computer systems may not be the best person to design your Web site. The person who designs great Web sites may not be the one to put together an e-commerce solution.

Some consultants prefer to only *advise you on* the best technology for your business and direct you to other providers/consultants for the actual implementation. And, always be on the lookout for technologists who can help your business grow - they are an invaluable resource.

Do not hire a technology consultant so you can remain clueless about technology. Even with a technology consultant at your beck and call, force yourself to subscribe to and read a few computer magazines such as PC World or PC Magazine so that you can have an overall understanding of the technology and terminology.

The consultant you use should know about or take the time to be familiar with your business and specific industry.

*Prepared by the WVConnectivity Technology Advisory Group.*

**Additional details on many of these technologies can be found at: [www.wvconnectivity.net](http://www.wvconnectivity.net)**



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