

New Business Technology Checklist

Based on real issues encountered during small business technology projects.

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Each section describes a problem we have seen, the lesson we took from it, and what to write down. Print this page or download the PDF, and tick off each item as you finish it.

Two terms used below: the **registrar** is the company where a domain name is registered, and **DNS** is the set of settings that connects a domain to a website and email.

1. Domain Ownership & Access

OBSERVED ISSUE

Businesses often know their website address but cannot immediately answer:

- Where the domain is registered
- Who owns the registrar account
- Who can make DNS changes

This becomes a problem during:

- Website migrations
- Email setup
- DNS changes
- Vendor transitions

LESSON

Document:

- ☐ Registrar name
- ☐ Account owner
- ☐ Recovery email
- ☐ DNS administrator

The business should always know how to access its domain.

2. Registrar Account Control

OBSERVED ISSUE

The domain account is frequently controlled by:

- A former consultant
- A friend who helped initially
- A personal email address
- Someone no longer involved with the business

LESSON

Business-critical accounts should be controlled by the business.

Administrative access should be reviewed and documented.

3. Business Email Setup

OBSERVED ISSUE

Business email is often treated as an afterthought.

We have repeatedly worked through:

- Creating business email after websites were already launched
- Updating contact forms
- Updating business listings
- Changing how email is delivered

LESSON

Establish professional email early.

Use the business domain from the beginning when possible.

4. Google Business Profile Ownership

OBSERVED ISSUE

Google Business Profile ownership can become difficult when:

- The listing was created years ago
- The original owner is unavailable
- Recovery information is unknown

LESSON

Document:

- ☐ Primary owner
- ☐ Additional administrators
- ☐ Recovery methods

The business should always know who controls its profile.

5. Account Recovery Planning

OBSERVED ISSUE

Many systems work perfectly until access is lost.

Examples include:

- Domains
- Microsoft 365
- Hosting providers
- Google accounts

The challenge usually isn't the service itself. The challenge is recovering access.

LESSON

Document these before a problem occurs:

- ☐ Recovery emails
- ☐ Recovery phone numbers
- ☐ Backup administrators

6. Documenting Credentials & Vendors

OBSERVED ISSUE

During transitions and troubleshooting, businesses often struggle to identify:

- Vendors
- Hosting providers
- Subscription services
- Account credentials

Information is spread across email threads, old documentation, and individual employees.

LESSON

Maintain a simple technology inventory that includes:

- ☐ Vendors
- ☐ Services provided
- ☐ Administrative contacts
- ☐ Renewal information

Write down where each login is kept and who can reach it. Do not write the passwords themselves in the inventory.

7. Organizational vs Personal Ownership

OBSERVED ISSUE

This is probably the most common theme across many projects.

Business services are often tied to:

- Personal email addresses
- Personal Microsoft accounts
- Personal Google accounts

Everything works until:

- Personnel changes
- Ownership changes
- Account recovery is required

LESSON

Whenever possible, important business services should be owned by the organization rather than a single individual.