

Small Business Security Checklist

A practical guide to protecting your business and people

How to use this checklist Print or share it with your team. Pick one area to focus on at a time, and review progress quarterly.

1. Make security part of everyday work

- Start team meetings with a short “security moment”
- Rotate who shares a quick tip or recent scam to keep it relatable
- Share real examples of phishing or social engineering attempts
- Recognize one good security action each month and thank the person behind it

2. Build confidence against phishing

- Set up an easy way to report suspicious emails, such as MailRisk
- Run small, supportive phishing simulations each quarter
- Keep the tone positive and use simulations to teach, not to test
- Share results in plain language so everyone sees progress

3. Rehearse your response before a crisis

- Use PrepJam or a similar tool to run a short, realistic exercise
- Include managers, communications, and frontline staff, not just IT
- Identify who would contact customers, update the website, or alert staff
- Assign clear owners for each key task and record them

4. Review and tailor your training

- Review your current security awareness training
- Remove modules that do not fit your business or audience
- Group people by role and tailor lessons to the risks they face
- Keep learning short, relevant, and easy to revisit

5. Protect people’s privacy

- Check that your security tools do not rank or name individuals
- Be clear about what is being measured and why
- Share team-level results instead of individual scores
- Ask for feedback to make reporting more transparent and trusted

6. Keep your digital house in order

- Use a password manager and turn on multi-factor authentication
- Back up critical data and test that it can be restored
- Keep software and devices updated automatically
- Remove old accounts and unused apps
- Limit access to sensitive files to those who need it

7. Track progress and celebrate wins

- Review this checklist with your team every quarter
- Choose one focus area for improvement each time
- Share positive outcomes from simulations or training
- Celebrate progress publicly to keep motivation high