TEAM AND RESILIENCE

Client data access matrix

A practical matrix for recording who needs access to client systems, why they need it, the access level, the owner, and the next review date.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

Client access is scattered or hard to review responsibly.

WORK THROUGH THE CHECKLIST

- [ ] 01 **List systems and data**
- [ ] 02 **Name each access owner**
- [ ] 03 **Set the minimum access**
- [ ] 04 **Record approval**
- [ ] 05 **Set review dates**
- [ ] 06 **Remove access at closeout**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.