



SPECIALIST WORKFLOWS

Service business security basics checklist

A practical, non-technical checklist for improving access hygiene, account ownership, backups, device updates, vendor review, and incident contacts.

A practical worksheet from Stelaah

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

HOW TO USE THIS

You want a sensible baseline for protecting client work and accounts.

WORK THROUGH THE CHECKLIST

☐ 01 **Use unique sign-in methods**

☐ 02 **Turn on multi-factor authentication**

☐ 03 **Review access regularly**

☐ 04 **Keep software updated**

☐ 05 **Check backups**

☐ 06 **Record incident contacts**

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.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.