



Small Business Tech Roadmap

A practical plan for a reliable, secure, and scalable technology foundation

Use this roadmap to review the systems your business depends on, choose the right priorities, implement improvements deliberately, and keep technology aligned with your goals.

- 1 ASSESS Understand the current environment and its risks.
- 2 PLAN Prioritize work by business value and urgency.
- 3 IMPLEMENT Introduce changes in manageable, tested stages.
- 4 OPTIMIZE Measure results and maintain the foundation.

1. Assess

Build an honest picture of how work gets done today.

Inventory

- Devices, applications, subscriptions, vendors, domains, and network equipment
- Where business data is stored, who can access it, and how it is backed up
- Recurring manual processes, duplicated entry, and common support issues

Questions to answer

- Which systems would stop the business if they became unavailable?
- Are account ownership, administrator access, and recovery details documented?
- When was a backup last restored successfully?
- Where do delays, errors, or security concerns occur repeatedly?

Output: a concise system inventory and a ranked list of risks and friction points.

2. Plan

Turn findings into a focused, achievable sequence of work.

Prioritize each opportunity by:

- Business impact: time, revenue, customer experience, continuity, or security
- Urgency: active exposure, approaching deadline, or growing operational cost
- Effort: implementation, migration, training, and ongoing support

Define success before buying or building

- Name an owner and the people affected by the change.
- Establish a baseline such as hours spent, errors, downtime, or response time.
- Document budget, dependencies, risks, and a rollback approach.
- Prefer a small number of connected improvements over disconnected tools.

Output: a 90-day plan with owners, milestones, measures, and decision points.

3. Implement

Make changes safely and bring the team along.

Implementation checklist

- Confirm a current, tested backup before changing production systems.
- Pilot with a representative group and collect practical feedback.
- Configure access using least privilege and multi-factor authentication.
- Document the new workflow, administration, support, and recovery steps.
- Train users around their real work rather than product features alone.
- Roll out in stages, monitor results, and keep a rollback option available.

Output: an adopted solution with clear ownership and operational documentation.

4. Optimize

Protect the investment and improve it as the business changes.

Review after 30, 60, and 90 days

- Compare results with the baseline and success measures.
- Ask users where work is still confusing, slow, or duplicated.
- Review permissions, alerts, backups, integrations, and vendor performance.
- Retire old accounts, tools, and processes that are no longer required.

Establish a recurring technology review

- Revisit priorities quarterly and after meaningful business changes.
- Review security, continuity, renewals, and the roadmap at least annually.

Need help turning this roadmap into a plan?

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