Boyd & Co

CEO Technology Audit Checklist

25 questions every CEO should ask about their technology — before it becomes a problem.

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HOW TO USE THIS CHECKLIST

Your Technology Audit Starts Here

This checklist is designed for CEOs, COOs, and senior leaders who want a clear-eyed view of their technology situation — without needing a technical background. Work through each section honestly. Any item you can't answer confidently is a gap worth investigating.

✓ Yes, clearly	No issue here
■ Partially / unsure	Worth a closer look
✗ No / don't know	Priority area — act on this

SECTION 1

Infrastructure & Reliability

	Question	Notes
☐	**Are your core systems (servers, networks, cloud) current and properly maintained?** Systems more than 5 years old without a replacement plan are a risk.	
☐	**Do you have documented uptime/availability targets for critical systems?** If you don't know your uptime SLA, you don't know your risk.	
☐	**Is your backup and disaster recovery plan tested at least annually?** An untested backup is not a backup.	
☐	**Can your infrastructure scale if your business doubles in size?** Growth that outpaces infrastructure is a common and expensive surprise.	
☐	**Do you have a clear inventory of all hardware and software in your environment?** You can't protect or manage what you haven't documented.	

SECTION 2

Cybersecurity

	Question	Notes
☐	**Do you have a written cybersecurity policy that all staff have acknowledged?** Policy is the foundation. Without it, training and tools have no frame.	

Is multi-factor authentication (MFA) enabled on all critical systems? MFA blocks over 99% of automated credential-based attacks.	
Have you conducted a cybersecurity risk assessment in the last 12 months? The threat landscape changes. Your assessment should too.	
Do you have cyber liability insurance, and do you understand what it covers? Most policies have exclusions that surprise companies at claim time.	
Is there a clear process for reporting and responding to a security incident? The first hour of a breach response is the most critical.	
Are all software systems receiving regular security patches? Unpatched systems are the most common entry point for attackers.	

SECTION 3

Data & Integration

Question	Notes
Do your core business systems share data automatically, or is data manually transferred? Manual data transfer is a hidden cost and a reliability risk.	
Do you have a single, trusted source of truth for your key business metrics? If different teams use different numbers, decisions suffer.	
Is customer data stored securely and in compliance with applicable privacy laws? PIPEDA compliance is a legal obligation, not optional.	
Do you know where all your sensitive data lives — including on staff devices? Shadow IT and personal devices are common data risk vectors.	

SECTION 4

Vendors & Contracts

Question	Notes
Do you have current contracts with all your major technology vendors? Month-to-month or verbal arrangements expose you to sudden price or service changes.	

☐	**Are you confident your vendors are delivering value relative to their cost?** Most technology contracts auto-renew without review.
☐	**Do you have a primary and backup vendor for your most critical technology services?** Single-vendor dependency is a business continuity risk.
☐	**When did you last competitively bid your major technology contracts?** Markets change. Loyalty without review costs money.

SECTION 5

Strategy & Leadership

	Question	Notes
☐	**Do you have a documented technology roadmap for the next 12–24 months?** Without a roadmap, technology spend is reactive rather than strategic.	
☐	**Is there a senior leader accountable for technology outcomes in your organisation?** Technology without executive ownership drifts.	
☐	**Does your board/leadership team review technology risk at least quarterly?** Technology risk is business risk. It belongs in the boardroom.	
☐	**Are technology investment decisions made based on business outcomes, not just IT requests?** The best technology investments are framed as business cases, not technical needs.	
☐	**Do you have independent advice available when evaluating major technology decisions?** Vendor-only advice is not independent advice.	
☐	**Is your team able to execute the technology strategy you've set?** Strategy without capability is wishful thinking.	

NEXT STEPS

What to Do With Your Results

If you found three or more items you couldn't answer confidently, your technology situation deserves a closer look. The good news: most gaps are fixable, and knowing where they are is the first step.

Book a free 30-minute discovery call with Derek Boyd. Share your results from this checklist and get an honest, independent assessment of your most pressing technology risks — at no cost. boydandco.ca/contact | hello@boydandco.ca | (604) 765-2963

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