

SINHA
STRATEGIC TECH INC

FREE PLANNING GUIDE

The Small Business Technology Planning Guide

Know where you stand before you buy,
switch or move

CALGARY, ALBERTA

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Fill in the worksheets on screen, or print them and write on them. Bring your completed copy to a consultation and it will go faster.

START HERE

Welcome



Most small businesses don't set out to build a technology setup. It grows. A router arrives with the internet service. Someone buys a printer. A cloud account gets opened for one project and never closed. Five years later, the business depends on all of it, and nobody is quite sure how it fits together.

This guide is for owners of home-based businesses and small businesses, from one person up to about 25. You don't need any technical background. Technical terms are explained in plain language as they come up, and there is a glossary at the back.

What this guide is. A way to see where you stand, gather what you already know, and ask better questions before you buy, switch or move.

What this guide is not. It does not tell you what to buy or how to set anything up. Those choices depend on your people, your space and your plans, and that is what a proper design is for. Where this guide gets close to that line, it stops at the question.

How to use it

1. **Do the readiness check** (Part 1). Ten questions, about five minutes.
2. **Fill in the inventory** (Part 2). This is the most useful thing in the guide. Take your time.
3. **Read only what you need.** Parts 3 to 6 stand on their own. Skip around.

You can fill in the worksheets and checklists on screen in most PDF readers, or print the pages and write on them. Both work.

Other free guides

Security and AI are covered in separate free guides from our parent company, Rhiza Tech Consulting: *Small Business Security Checklist*, *Protect Yourself Online*, *A Plain-Language Guide to AI* and *Using AI Safely at Work*. We won't repeat them here.

PART 1

Readiness check

Answer each question with the option that is closest to your situation today, not the one you wish were true. There are no trick questions and no wrong answers. If you aren't sure, choose the lower-scoring option. Not knowing is itself useful information.

The first two questions describe the size of your business and aren't scored. The other eight are scored from 0 to 3.

Question 1. How many people use technology in your business? (not scored)

- ☐ A Just me
- ☐ B 2 to 5 people
- ☐ C 6 to 25 people
- ☐ D More than 25 people

Question 2. How many locations does your business work from? (not scored)

- ☐ A One (a home office or a single space)
- ☐ B One main location, plus people who work from home
- ☐ C Two or more locations

Question 3. How reliable is your internet connection?

- ☐ A It drops out or slows down several times a week 0 points
- ☐ B It causes problems a few times a month 1 point
- ☐ C It rarely causes problems 2 points
- ☐ D It's dependable, and I know what I'd do if it went down 3 points

Question 4. How good is your Wi-Fi coverage where you work?

- ☐ A There are places we work where the signal is weak or drops 0 points
- ☐ B It's usually fine, but we've had complaints 1 point
- ☐ C It works well in the places we work 2 points
- ☐ D It works well everywhere we need it, and we know how many devices it handles 3 points

Question 5. Do you know where your important business files live?

- ☐ A They're scattered across computers, phones and accounts, and I couldn't list them all 0 points
- ☐ B I know the main places, but not everything 1 point
- ☐ C I can name where most of them are 2 points
- ☐ D I can name every place, and everyone on the team knows where to save things 3 points

Question 6. How confident are you in your backups?

- ☐ A I don't think we have backups, or I'm not sure 0 points
- ☐ B We have a backup, but I've never checked that it works 1 point
- ☐ C We have backups, and I know what's covered and what isn't 2 points
- ☐ D We have backups, copies are kept in more than one place, and we've tested getting files back 3 points

Question 7. Do you know who has access to what?

- ☐ A People share logins, or I couldn't say who can get into what 0 points
- ☐ B I know the main accounts, but not all of them 1 point
- ☐ C I have a rough list of accounts and who uses them 2 points
- ☐ D I have a current list, and I know what to do when someone joins or leaves 3 points

Question 8. If the person who set up your technology were unavailable tomorrow, could someone else find their way around?

- ☐ A No. It's all in one person's head 0 points
- ☐ B Maybe, with a lot of guessing 1 point
- ☐ C Mostly. Some things are written down 2 points
- ☐ D Yes. Passwords, accounts, equipment and connections are documented and kept somewhere safe 3 points

Question 9. How old is your main equipment (computers, router and other core devices)?

- ☐ A Most of it is more than five years old, or I don't know its age 0 points
- ☐ B A mix, with some of it getting old 1 point
- ☐ C Mostly under five years old 2 points
- ☐ D I know the age of each item and when I expect to replace it 3 points

Question 10. Over the next two to three years, how much will your business change (more people, new location, remote work, new services)?

- A** A lot, and I haven't thought about what that means for technology 0 points
- B** Some change, and technology is an afterthought 1 point
- C** Some change, and I've thought about what it might need 2 points
- D** Little change expected, or I already have a technology plan that covers it 3 points

Your score

Add up the points for questions 3 to 10.

Your total (0 to 24)	Your result
0 to 7	Time for a plan
8 to 14	A few gaps
15 to 20	A good base
21 to 24	Solid foundation

My total: _____ / 24

One more check, whatever your total. If you chose the first option (A) for question 5, 6, 7 or 8, treat that area as a priority even if your total is high. A gap in where your files are, your backups, who has access, or what is written down can matter more than a good score elsewhere.

Areas where I scored 0: _____

What your result means

Time for a plan (0 to 7)

Your technology has probably grown without a plan, which is common. Your answers suggest several areas where something could go wrong and be hard to fix quickly. That isn't a judgment. It simply means the next step is understanding what you have before you spend anything.

Next steps:

1. Complete the inventory in Part 2. It will show you what you have and what you don't know.
2. Read Part 3, starting with the areas where you scored 0 or 1.
3. Consider a free consultation to talk it through. There is no obligation.

A few gaps (8 to 14)

You have a working setup with some weak spots. A setup like this is often fine day to day but exposed when something changes, such as a failure, a departure, a move or growth.

Next steps:

1. Look at the questions where you scored 0 or 1. Those are your priorities.
2. Fill in the inventory in Part 2, focusing on accounts and where files live.
3. Use the questions in Part 4 the next time you talk to a provider or vendor.

A good base (15 to 20)

Your answers suggest things are in decent shape. The gaps that remain are usually about documentation and planning for change, not about what's broken today.

Next steps:

1. Write down what is currently only in your head (Part 2).
2. Read Part 3 for the areas where you scored below 3.
3. If you're growing or moving, read Part 5 and think about whether the setup will still fit.

Solid foundation (21 to 24)

Your answers suggest you know what you have, can recover when something goes wrong, and are planning ahead. Keep your inventory current, and review it at least once a year or whenever the business changes.

Next steps:

1. Keep the Part 2 worksheets up to date.
2. Revisit this check when you grow, move or change providers.
3. Use Part 4 whenever you sign a new contract.

A note on the size questions. Your answers to questions 1 and 2 don't change your score. They simply help us describe the size of your business if you decide to talk to us.

PART 2

Know what you have

You can't plan what you can't see. This part helps you gather, in one place, what you already know. Owners are often surprised by what they find: subscriptions nobody uses, devices nobody remembers buying, accounts only one person can open.

Why it matters. When something breaks, when someone leaves, when you want a quote, or when you move, this list is what everyone reaches for. If you do book a consultation, bringing a completed copy makes the conversation faster and more useful.

A tip. Don't aim for perfect. A rough list today beats a perfect list that never gets written. Write "don't know" where you don't know. That is a finding, not a failure.

A caution. This worksheet records *where* things are, not secrets. Don't write passwords in it. Keep passwords in a proper place designed for them (see Rhiza's free guides) and note only where that place is.

Worksheet A: Devices

List every device the business depends on. Include personal devices that are used for work.

Device	Make / model	Who uses it	Approx. age	Notes (problems, warranty, plans to replace)
Computer 1				
Computer 2				
Computer 3				
Computer 4				
Phone / tablet 1				
Phone / tablet 2				
Printer / scanner				
Router / modem				
Other network equipment				
Server / storage device				
Other (phone system, cameras, etc.)				

Not sure of the age? Check the receipt, the sticker on the device, or your account with the seller. "About" is fine.

Worksheet B: Internet service

Question	Your answer
Provider	
Plan name / speed	
Monthly cost	
Contract start date	
Contract end date	
Account holder (whose name is it in?)	
Account number	
Support phone number	
Who owns the modem / router (you or the provider)?	
Is there a backup connection?	
Known problems (outages, slowdowns, dead zones)	

Worksheet C: Accounts and subscriptions

Include software, email, cloud storage, website and domain, and anything billed monthly or yearly.

Service	What it's used for	Who pays	Cost	Renewal date	Who has admin access
Email					
Cloud storage					
Accounting software					
Office software					
Website / domain name					
Phone / messaging					
Other					
Other					
Other					

Who is the account in the name of? Check this for each one. Accounts opened in a former employee's name, a contractor's name or a personal email address are one of the most common surprises.

Worksheet D: Who has access to what

Person	Role	Email address	Systems and accounts they use	Started	Date access should end (if known)

Also list: contractors, bookkeepers, web designers and anyone outside the business with access to something.

Worksheet E: Where important files live

Type of file	Where it lives now	Who knows how to get to it	Is it backed up? (yes / no / not sure)
Customer / client records			
Financial and tax records			
Contracts and legal documents			
Employee records			
Photos, designs, project files			
Email history			
Other			

Worksheet F: What's frustrating right now

Write down anything that annoys you or your team. Slow computers, dropped calls, confusion about where something is saved, a printer that never works. Frustrations are clues.

1.

2.

3.

4.

5.

PART 3

What does your business actually need?

Before choosing anything, it helps to be clear about what the business needs from its technology. This part gives you questions to think through and plain-language explanations of the main areas. It doesn't tell you what to buy or how to set it up, because the right answer depends on your situation.

Start with your business, not the technology

Work through these on paper. There are no right answers.

People

- How many people work for the business now? How many in two or three years?
- Does anyone join or leave often (seasonal staff, students, contractors)?

Places

- Where does work happen? One room, one building, several places, people's homes, clients' sites?
- Does anyone need to reach business files or systems from outside the main workspace?

Daily work

- What do you do on a typical day that depends on technology? Video calls, invoicing, design work, taking payments, handling customer data?
- What would stop if the internet went down for a day? For a week?
- What would stop if your main computer failed today?

Change

- What is likely to change in the next two to three years? More people, a new location, new services, remote work?
- Is a move or a renovation coming?

Frustration

- Look at your answers to Worksheet F. What do they have in common?

The big areas, in plain language

Internet and Wi-Fi

What it is. Your internet connection is how your business reaches the outside world. Wi-Fi is how your devices reach that connection without cables.

Why it matters. Almost everything else depends on it: email, cloud files, payments, calls. A connection that is slow or unreliable quietly costs time every day. Wi-Fi problems are often caused by the building and layout, not just the equipment, which is why the same setup can work well in one office and badly in another.

Questions worth asking yourself. Are there places where you work that have a weak signal? How many devices connect at once, including phones, printers and other people's devices? What happens to your business if the connection fails?

Where your files and data live

What it is. Business files can live on a single computer, on a shared device in your office, in an online service ("the cloud"), or a mix. Most businesses end up with a mix without ever deciding to.

Why it matters. If you don't know where your files are, you can't protect them, move them or find them when you need them. A file that exists in only one place is a file that can be lost.

Questions worth asking yourself. Can you list every place business files are stored? Who can reach them? If a computer were lost today, what would be gone with it?

Backups

What it is. A backup is a separate copy of your files, kept so you can get them back if the original is lost, damaged, deleted or locked.

Why it matters. Computers fail, laptops are stolen, files are deleted by accident, and a copy that lives next to the original is often lost along with it. A cloud service is not automatically a backup either. It may only mirror what is on your computer, including the mistakes.

A simple principle: three copies, two places, one off site. Many people use a rule of thumb known as "3-2-1":

- **Three** copies of anything important (the original plus two others).
- **Two** different places or types of storage, so a single failure doesn't take out everything.
- **One** copy kept off site, away from your workspace, so a fire, flood or theft doesn't reach it.

This is a way to *think* about backups, not a plan for how to build yours. How it applies to your business depends on what you have and what you can't afford to lose.

The question most people skip: *Have you ever actually tried to get a file back?* A backup you've never tested is a hope, not a plan.

Accounts and access

What it is. Every system your business uses has accounts: logins for people, and often an "administrator" account that controls everything else.

Why it matters. Who can get into what is one of the most important facts about your technology. When a person leaves, their access should end. When an owner is unavailable, someone trusted should still be able to get in. Shared logins and accounts held in the wrong person's name cause problems nobody notices until the moment they matter.

Questions worth asking yourself. Whose name is each account in? Who is the administrator? What happens to access when someone leaves?

For practical security steps, see Rhiza's *Small Business Security Checklist*. We keep the planning questions here and the security how-to there.

Equipment age

What it is. All equipment has a useful life. Eventually it slows down, fails, or stops receiving updates from its maker. When that happens it is often called "end of life".

Why it matters. Old equipment tends to fail at the worst time, and it may no longer be supported. Knowing the age of what you have lets you replace things on your schedule instead of in an emergency.

Questions worth asking yourself. Do you know the age of your main devices? Do you know which are still supported by their makers? Is anything holding up your whole business that you've never planned to replace?

Documentation

What it is. Written records of what you have and how it connects: your equipment, accounts, providers, and who to call.

Why it matters. Without it, only the person who set things up knows how they work. With it, anyone you trust can find their way around, and any professional you hire can start work faster.

Questions worth asking yourself. If the person who knows your setup were unavailable, could someone else pick it up? Part 2 of this guide is a good start.

PART 4

Questions to ask before you sign

Whether you are renewing, switching or signing something new, a few questions can save a lot of trouble. Take this list with you, and write down the answers. If a provider won't answer plainly, that tells you something.

These lists are about contracts and service. They don't recommend any provider or product.

Asking an internet provider

- What exactly am I getting (speeds, data limits, any conditions)? Is the speed I'm quoted what I should expect in practice, or the best case?
- What is the contract length? What are the fees if I leave early?
- What is the total monthly cost, including equipment rental and any fees, and for how long is the price guaranteed?
- Who owns the modem and router? What happens to them if I cancel?
- When is support available? Is there a business support line, and what is the typical repair time when service goes down?
- Is installation included? How long until it's live? Is there a technician visit, and what do I need to prepare?
- Can I keep my current plan if I move? What happens to the contract?
- What happens if I need to upgrade or downgrade?
- What documentation will I receive (account details, equipment details)?

Asking an installer or IT company

- What exactly is included, and what is not? Can I have that in writing?
- Who owns the equipment, the accounts and the administrator logins once the work is done?
- What documentation will I receive at the end? Will it include a record of what was installed and how it connects?
- What is the cost structure: one-time, hourly, monthly? What could make the total higher?
- What are your support hours, and how quickly do you respond to a problem?
- What happens if something fails after the job is done? Is there a warranty on the work?
- Who actually does the work: you, or subcontractors?
- How do you handle access to my systems and data while you work, and when the job ends?
- If I want to stop working with you, what do I get, and how easy is the handover?
- Can I speak with another customer with a similar business?

Asking an equipment or software vendor

- Is this a one-time purchase or a subscription? What does the total cost look like over three years?
- How long will it be supported with updates and fixes?
- What is the warranty, and what does it cover?
- Who is the account holder, and what is the cost to add users?
- How do I get my data out if I stop using it, and in what format?
- What happens to my data if I stop paying?
- What does it work with? Does it need anything else to run that isn't included?
- What does the licence allow (how many people, what kinds of use)?

One question for everyone

"If I decided to leave you in two years, what would that look like?"

A good provider can answer this calmly and clearly.

PART 5

Moving offices? Technology checklist

Technology is often the last thing people think about in a move and the first thing they miss on day one. This checklist covers logistics only: booking, labelling, notifying and testing. It doesn't include setup or configuration steps.

Lead times vary by provider, building and time of year. Start earlier than you think you need to.

About 8 weeks out

- ☐ Find out which internet providers serve the new address and what they offer.
- ☐ Book internet service for the new location as early as you can. Installation can take days or weeks depending on the provider and the building.
- ☐ Check your current internet contract: end date, early cancellation fees, and whether it can move with you.
- ☐ Ask the building or landlord what is already in place (cabling, wall jacks, access to common areas) and what you may and may not change.
- ☐ Set a moving date, and decide how long you can be without technology.
- ☐ Review Worksheets A to E and flag what is old, unused or not worth moving.

4 weeks out

- ☐ Confirm the internet installation date, and who needs to be present.
- ☐ Decide what equipment is moving, what is being replaced and what is being retired.
- ☐ Arrange for a safe, secure disposal of anything you're retiring, especially anything that stores data.
- ☐ Confirm that backups of everything important are current, and that you know how to get files back.
- ☐ Make a list of everyone and everything that needs your new address: customers, suppliers, banks, insurance, government accounts, website, online listings, shipping and billing accounts.
- ☐ Ask your phone provider how to keep your business phone number.

2 weeks out

- ☐ Update your address with the people on the list above.
- ☐ Order any new equipment, allowing time for delivery.

- ☐ Label each device, cable and box with where it belongs in the new space. Take photos of how things are connected now.
- ☐ Tell your team the dates and what they're responsible for packing.
- ☐ Confirm the landlord, building or movers have what they need for access and timing.
- ☐ Re-confirm the internet installation appointment.

Moving week

- ☐ Run a final backup and check that it finished.
- ☐ Pack technology in clearly labelled boxes, and keep cables with the devices they belong to.
- ☐ Carry the most valuable and fragile items yourself, or use a method you trust.
- ☐ Keep your inventory (Part 2) and your provider contact details with you, not in a box.
- ☐ Keep a short list of what is where in case anything goes missing.

First day

- ☐ Check that the internet is live and that service matches what you ordered.
- ☐ Unpack and connect things according to your labels and photos.
- ☐ Test the essentials before anything else: internet, email, phone, printing, card payments, access to files.
- ☐ Walk the whole space and check Wi-Fi in every place people will work.
- ☐ Make a list of anything that isn't working.

First week

- ☐ Work through your list of issues and contact providers about anything that's wrong.
- ☐ Confirm that backups are still running from the new location.
- ☐ Update your inventory (Part 2) with changes: new equipment, new accounts, removed items.
- ☐ Confirm that nothing is still billing to the old location, and cancel services you no longer need.
- ☐ Ask your team what's not working for them. People notice problems you won't.

PART 6

Plain-language glossary

Access point.

A device that provides Wi-Fi. Bigger spaces often need more than one.

Administrator (admin).

The account that controls a system and everyone else's access to it.

Backup.

A separate copy of your files, kept so you can get them back if the original is lost or damaged.

Bandwidth.

How much data your connection can carry at once. Think of it as the width of a pipe.

Cloud storage.

Files kept on a company's computers on the internet instead of only on your own devices.

DNS.

The internet's address book. It turns a name like a website address into the number computers use to find it.

Domain (domain name).

Your address on the internet, like the part after the @ in your email address or the name of your website.

End of life.

When a maker stops supporting a product with updates and fixes.

Ethernet.

A wired network connection using a cable, as opposed to Wi-Fi.

Fibre.

Internet delivered over glass cables using light, which can carry a lot of data quickly. Whether it's available depends on your address.

Firewall.

A security barrier between your network and the internet that decides what traffic is allowed in and out.

Hardware.

The physical parts: computers, routers, printers and so on.

IP address.

A number that identifies a device on a network, a bit like a street address for that device.

ISP (internet service provider).

The company that supplies your internet connection.

Latency.

The delay between asking for something and getting a response. High latency makes video calls choppy.

Licence.

Permission to use software, usually with limits on who can use it and how many people.

Managed service.

An arrangement where an outside company looks after part of your technology for a regular fee.

Mesh Wi-Fi.

A Wi-Fi system made of several linked units that work together to cover a larger area.

MFA (multi-factor authentication).

Signing in with more than a password, such as a code from your phone. Also called two-step verification.

Modem.

The device that connects your building to your internet provider's network.

NAS (network-attached storage).

A storage device connected to your network so several people can save and share files.

Network.

The group of devices in your workspace that are connected so they can communicate.

Off site.

Stored away from your workspace, such as a backup kept somewhere else.

On-premises.

Kept at your own location instead of online.

Redundancy.

Having a second way to do something important, such as a spare internet connection, so one failure doesn't stop the business.

Router.

The device that directs traffic between your devices and the internet. Many providers supply one box that combines a modem, a router and Wi-Fi.

Server.

A computer whose job is to provide a service to other computers, such as storing files or running software.

SSO (single sign-on).

Using one login to get into several services.

Static IP.

An internet address that stays the same instead of changing. Some services need one.

Subscription.

A recurring payment for software or a service, instead of a one-time purchase.

Switch.

A device that connects several wired devices on your network so they can talk to each other.

UPS (uninterruptible power supply).

A battery that keeps equipment running briefly if the power cuts out.

Uptime.

The share of time a service is working and available.

VLAN.

A way to divide one network into separate sections, so some devices are kept apart from others.

VPN.

A private, protected connection over the internet, often used to reach a workplace network from elsewhere.

Wi-Fi.

Wireless connection between your devices and your network.

When to get a professional design

You can run a small business for years without one. But there are moments when a professional design pays for itself in time and trouble avoided.

Signs it's time

- **You're growing.** More people, more devices, or a second location.
- **You're moving or renovating.** A new space is a good time to get things right.
- **Things keep going wrong.** The same problems repeat, and fixes never last.
- **Nobody knows how it's connected.** The setup lives in someone's head, or the person who built it is gone.
- **You're about to spend significant money.** A design can help you avoid buying the wrong thing.
- **You're replacing most of your equipment at once.** It's a chance to start from a plan.
- **You can't answer the questions in Part 1.** If many of the answers were "I don't know", a plan will help.

What a good design includes

At a high level, a good technology design for a small business includes:

- **Recommendations** based on how your business actually works.
- **Options at different price points**, so you can choose what fits your budget.
- **Diagrams** showing how everything connects.
- **Documentation** you keep, so anyone can understand and maintain the setup.

A design should give you something you can use with any installer, not something that locks you to one.

WORK WITH US

Want a design for your business?

If this guide has shown you gaps, we'd be glad to help. There is no pressure, and everything in this guide is yours to use either way.

Sinha Strategic Tech designs. We don't build. We design the infrastructure, and you decide who builds it. Our parent company, Rhiza Tech Consulting, can do the build on its own separate quote and invoice, or you can take the design to any installer you like.

How it works

1. **Free consultation.** On site in the Calgary area, or by video call from anywhere. For a video call, you walk us through your space on your phone.
2. **Design.** For a flat fee, you receive recommendations, one to three hardware quotes (from essential to top tier), network diagrams and connection documentation. Typical turnaround is three to five business days.
3. **You approve.** Nothing moves forward without your say.
4. **Build (optional).** If Rhiza Tech Consulting does the build, it is quoted separately, and your full design fee is credited toward it.

Starting prices

Starting prices in Canadian dollars, plus applicable taxes. The final price depends on the size and complexity of your business.

Design	From	Best for
Home Office	\$500	Home-based businesses, up to about 5 people, one location
Small Office	\$1,200	About 6 to 25 people, one site
Multi-Site	\$2,500	More than 25 people, or more than one location

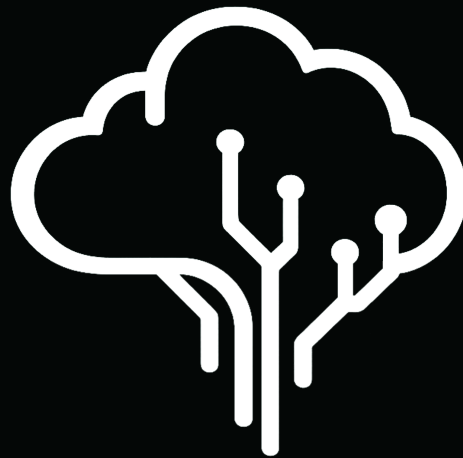
Get in touch

contact@sinhastrategictech.ca

Monday to Friday, 8:00 am to 6:00 pm MT. Closed weekends. We typically reply within 24 to 48 hours.

Bring your completed worksheets from Part 2 if you have them. It makes the consultation faster.

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S I N H A
STRATEGIC TECH INC

DESIGN AND ARCHITECTURE • CALGARY, ALBERTA

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Monday to Friday, 8:00 am to 6:00 pm MT