LESSON 01 OF 04 · 6 MIN · ESSENTIAL

Know where your data lives

You can't protect what you haven't found. A one-page map is enough to start.

The honest inventory

Business data is rarely in one place. Customer details are in the CRM, the accounts package, the owner's phone and a spreadsheet on someone's desktop. Contracts are in email. Payroll is with a bureau. The website holds enquiries.

Start with four categories: **customer**, **financial**, **staff** and **access** (credentials, keys, recovery codes). Add anything that would be expensive or embarrassing to lose.

Map the minimum

For each system: what it holds, who owns it, who can access it, how it's backed up, and how you'd recover it. Include personal devices and cloud accounts used for work. That “shadow IT” is often where the surprise lives.

An asset inventory template is in the templates section. Print it and fill it in with the people who actually know.

Keep less

The safest data is data you no longer hold. Set a retention period for customer records, job applicants, old invoices and backup copies. Delete what you no longer need, securely. Less data means less to breach, less to back up and less to explain.

> SHADOW IT

> The personal Dropbox, the USB stick in the drawer, the spreadsheet emailed to a home account. Ask people where they actually keep things, without blame, and bring the important ones into the managed environment.

Key takeaways

- ✓ Map customer, financial, staff and access data.
- ✓ Include personal devices and cloud accounts used for work.
- ✓ Record owner, access and backup for each system.
- ✓ Delete data you no longer need.

Generated free at resources.cicadacs.com · General guidance, not an audit or legal advice.