

# Secure File Sharing Readiness Checklist for SMBs

Assess your organization's file access, sharing, and data governance posture using this quick yes/no checklist.

## 1. File Access & Organization

- Employees can reliably find the files they need
- Our folder structure is consistent across departments
- We have clear naming conventions for folders and documents
- Remote staff experience stable access without VPN issues
- We rarely encounter duplicate or conflicting versions of files

## 2. Permissions & User Management

- Each team has defined access levels to shared folders
- Access rights are reviewed regularly
- Employee offboarding includes removing file access
- External users receive restricted, controlled access
- Admins can see who has access to what

## 3. Security Controls & Policies

- MFA is required for all users accessing company files
- Only approved devices can access business data
- Access can be limited based on network or IP range
- All file activity can be logged and reviewed
- Sensitive data is stored only in approved locations

## 4. External Sharing & Collaboration

- Shared links can be password-protected
- Links can expire automatically after use
- We know who currently has access to shared links
- File downloads can be restricted when needed
- Employees rarely resort to emailing files due to limitations

## 5. Compliance & Data Governance

- We know where our files are stored physically
- We can provide audit logs if requested
- Our setup supports GDPR data residency requirements
- Sensitive departments have restricted access zones
- We can document who accessed or changed a file

### Your file sharing readiness score

- ✓ **15–20 checks:** Strong readiness. Your file sharing setup appears structured and well-governed. Keep monitoring access controls and security policies.
- ! **8–14 checks:** Moderate readiness. There are gaps that may affect security, compliance, or daily operations.
- ✗ **0–7 checks:** High risk. Your current file sharing approach likely exposes your business to data loss, compliance risk, or operational inefficiencies.

### Next steps

Improving file access, sharing practices, and data governance is an ongoing process, not a one-time review.

If this checklist revealed gaps in how your business handles file access, permissions, external sharing, or compliance requirements, this is the right moment to address them.

Discuss your results with your IT service provider.

They can help:

- review your current setup in more detail
- identify areas that may expose your business to operational or compliance risks
- recommend a file sharing approach that aligns with your security, collaboration, and data-residency needs

Taking action now can reduce risk, improve daily operations, and ensure your data remains secure and accessible across your organization.

