

Business Technology Checklist

Introduction

Opening a new business/storefront is an exciting venture, but it also requires careful planning, especially when it comes to technology. This checklist is designed to guide you through the essential technology considerations for a successful launch. Ensuring that these systems are correctly implemented is crucial for smooth operations, security, and customer satisfaction.

How Summit Technology Advisors Can Help

Launching a storefront is challenging, but your technology doesn't have to be. Summit Technology Advisors becomes your dedicated technology partner, guiding you through every step of the process. We learn your business inside and out, then build a customized tech plan that aligns with your operations, budget, and growth goals.

From internet and phone systems to security cameras, access control, cybersecurity, POS systems, business software, and hardware, we research, compare, and vet the best options for you. You get organized choices, transparent pricing, and expert recommendations without spending hours sorting through vendors yourself.

Once you're ready, we can help coordinate installation, configuration, training, and ongoing support to make sure all technology is optimized and working seamlessly for your business.

Internet & Network

- **Internet Service Provider (ISP) Selection:**
 - Research and select a reliable ISP with sufficient bandwidth for your needs.
 - Consider upload and download speeds, data caps, and service level agreements (SLAs).
- **Network Infrastructure:**
 - Install a robust router and modem capable of handling your expected network traffic.
 - Implement a secure and properly configured Wi-Fi network for customers and employees.
 - Ensure adequate network coverage throughout the store.
- **Cabling:**

- Install structured cabling for wired devices (e.g., POS systems, computers).
- Label all cables clearly for easy identification and maintenance.

Phone Systems

- **Phone System Selection:**
 - Choose a phone system that meets your business needs (e.g., VoIP, traditional landline).
 - Consider features like call forwarding, voicemail, and auto-attendant.
- **Hardware Installation:**
 - Install phones and related hardware in strategic locations.
 - Ensure proper cabling and power connections.
- **Number Porting:**
 - If applicable, port your existing phone number to the new system.
- **Voicemail Setup:**
 - Configure voicemail greetings and settings for each extension.

Security Systems

- **Surveillance Cameras:**
 - Install security cameras strategically to monitor key areas (e.g., entrances, cash registers).
 - Ensure cameras are properly positioned and have clear visibility.
- **Alarm System:**
 - Implement an alarm system with sensors on doors and windows.
 - Connect the alarm system to a monitoring service for 24/7 protection.
- **Access Control:**
 - Consider implementing access control systems for sensitive areas (e.g., storage rooms).
 - Use key cards or biometric scanners to restrict access to authorized personnel only.

Cybersecurity

- **Firewall:**
 - Install and configure a firewall to protect your network from unauthorized access.
 - Regularly update the firewall's firmware and security rules.
- **Antivirus Software:**
 - Install antivirus software on all computers and devices connected to the network.
 - Keep the software up-to-date with the latest virus definitions.
- **Password Management:**
 - Implement strong password policies for all user accounts.
 - Encourage employees to use unique and complex passwords.
 - Consider using a password manager to securely store and manage passwords.
- **Employee Training:**

- Train employees on cybersecurity best practices (e.g., recognizing phishing emails, avoiding suspicious websites).
- Conduct regular security awareness training sessions.

Payment Processing

- **Payment Gateway Selection:**
 - Choose a secure and reliable payment gateway to process online and in-store transactions.
 - Consider factors like transaction fees, supported payment methods, and security features.
- **Point of Sale (POS) System:**
 - Install a POS system that integrates with your payment gateway.
 - Ensure the POS system is PCI compliant to protect customer payment information.
- **Credit Card Terminals:**
 - Install EMV-compliant credit card terminals to accept chip card payments.
 - Train employees on how to use the terminals properly.
- **Mobile Payment Options:**
 - Consider offering mobile payment options like Apple Pay and Google Pay.
 - Ensure your payment systems are compatible with these mobile wallets.

Software

- **Operating Systems:**
 - Install and configure operating systems on all computers (e.g., Windows, macOS).
 - Keep the operating systems up-to-date with the latest security patches.
- **Business Applications:**
 - Install and configure essential business applications (e.g., Microsoft Office, accounting software).
- **Inventory Management Software:**
 - Implement inventory management software to track stock levels and manage orders.
- **Customer Relationship Management (CRM) Software:**
 - Consider using CRM software to manage customer interactions and track sales leads.

In-Store Hardware

- **Computers and Laptops:**
 - Provide computers or laptops for employees to perform their tasks.
 - Ensure the hardware meets the minimum requirements for the software you'll be using.
- **Printers:**
 - Install printers for printing receipts, labels, and other documents.
- **Scanners:**
 - Use barcode scanners to scan products and track inventory.
- **Digital Signage:**

- Consider using digital signage to display promotions and information to customers.

Implementation Steps

Follow These Steps for a Smooth Technology Implementation

1. **Plan** – Outline your technology needs and requirements in a detailed plan.
2. **Budget** – Estimate costs for all hardware, software, and services.
3. **Choose Vendors** – Research and select reliable providers for your technology.
4. **Install** – Schedule and oversee the setup of all systems and devices.
5. **Test** – Make sure every system works correctly and reliably.
6. **Train** – Teach your team how to use the new technology effectively.
7. **Maintain** – Set up ongoing maintenance and support for long-term performance.

Or, skip the hassle and **contact us**. As your dedicated technology partner, we handle every step so your systems are installed, optimized, and ready to run smoothly.

Contact Us

For expert assistance with your new business technology setup, contact Summit Technology Advisors today!

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This checklist provides a comprehensive overview of the technology considerations for new storefronts. By carefully planning and implementing these systems, you can ensure a successful launch and ongoing operations. Summit Technology Advisors is here to help you every step of the way.



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