

Small Business Website Control Checklist

A practical workbook for growing small businesses

Companion resource for “Is Your Website Quietly Becoming a Business Risk?”

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Use this workbook with your team or website provider to check the arrangements your website depends on, record what you know, and decide what needs attention.

Start here

Business / organisation: _____

Website address: _____

Completed by and role: _____

Review date: _____ Next review: _____

What does your business rely on this website to do?

For example: attract enquiries, take bookings or payments, deliver training, support members, or collect applications.

If it stopped working, what would be affected first?

How to use this workbook

Make a first pass using what you already know. Mark unanswered questions for follow-up, then work through them with the appropriate person. You do not need to log in to unfamiliar systems or make technical changes to complete this review.

Write a status beside each check:

C = Confirmed. You have checked the details and can point to evidence.

? = Need to check. You are relying on an assumption or need an answer.

A = Needs action. You have identified a gap.

N/A = Not applicable. Record why it does not apply.

Evidence may include an account record, a renewal notice, a written explanation from your provider, or a test result. Record the date and where you keep the evidence.

An unknown is a useful finding. This is not a scored test: one serious recovery or access gap may matter more than several minor housekeeping issues.

Keep this completed workbook somewhere authorised people can find it. It may contain sensitive business details. Store passwords, recovery codes and secret keys in a password manager, not in this document.

01 Ownership and control

Can the business access and recover the accounts its website depends on?

Check and mark

- We know who holds and manages the domain account, and have checked the registrant details.
Status _____
- We know who manages hosting or the website platform, and how authorised access works.
Status _____
- Renewal notices reach a current contact, and we understand payment arrangements.
Status _____
- We know which important software licences and connected services the website relies on.
Status _____
- We understand what happens to access, licences and services if we change suppliers.
Status _____

Record the essentials

Domain registrar / account holder: _____

Renewal date / person receiving notices: _____

DNS managed by: _____

Hosting or website platform / account holder: _____

Business contact responsible for these arrangements: _____

Where authorised access and recovery arrangements are recorded:

Critical connected services, such as payments, bookings or forms:

Supplier-provided licences and what happens if the agreement ends:

Evidence checked, date and location: _____

Ask your provider

"Can you confirm who holds our key website accounts, who receives renewal notices, and how the business can recover access or arrange a handover?"

A supplier-managed account or licence can be a reasonable arrangement. The key is understanding the terms and agreeing on a way forward.

Priority concern: nobody can identify the domain account, notices go to a former staff member, or access depends on an unreachable person.

Next action / owner / due date: _____

02 Access and security

Do the right people have appropriate access, and can the business maintain it?

Check and mark

- We have reviewed who can access the website and other important accounts.
Status ____
- Each person's access matches their current responsibilities.
Status ____
- Former staff and contractor access has been reviewed.
Status ____
- Individual logins are used where supported, and important accounts have unique passwords.
Status ____
- Multi-factor authentication is enabled where available, including on email accounts used for password resets.
Status ____
- Recovery details are current, and authorised people can follow the recovery process.
Status ____
- A named person handles software updates and security alerts.
Status ____

Record what needs attention

User access list reviewed by / date: _____

Accounts or people needing an access change:

Who will confirm the change is safe before it is made?

Important accounts still needing multi-factor authentication:

Where the approved password and recovery process is documented:

Person responsible for updates / alerts: _____

Who covers them when unavailable? _____

Evidence checked, date and location: _____

Ask your provider

“Can we review who has access, what each person can do, and how the business recovers access if someone leaves or loses their phone?”

Before deleting accounts, check whether they own content or support automated processes. Agree changes with the person responsible.

Priority concern: former staff retain unnecessary administrator access, everyone shares one login, or account recovery depends on a single person’s device.

Next action / owner / due date: _____

03 Backups and recovery

Could you recover the website and the information the business needs?

Start with the business impact

How long could we manage without the website? _____

How much recent information could we afford to lose? _____

What would be difficult to reconstruct, such as orders or bookings?

Check and mark

- We have confirmed the latest successful backup and how often backups run.
Status ____
- We understand what is included and excluded, including files, database records and connected services.
Status ____
- Backup frequency and retention meet our recovery needs.
Status ____
- A recovery option remains available if the main hosting is inaccessible.
Status ____
- A named person can restore the site, with the access they need.
Status ____
- We have evidence of a restoration test and understand any limitations.
Status ____
- We have an agreed response process and a temporary way to help customers.
Status ____

Record the recovery arrangement

Backup provider / responsible person: _____

Latest successful backup: _____ Frequency: _____

How long older backups are kept: _____

Included / excluded: _____

Where backups are stored and who can access them:

Latest restoration test / result / evidence location:

Who restores the site / contact / expected response arrangement:

How new orders or bookings are handled during recovery:

Temporary customer contact or booking method: _____

Ask your provider

"If we had to recover today, which information could we lose, who would restore the site, and what evidence shows the recovery process works?"

A successful backup notification does not prove a complete restoration will work. Arrange testing with a competent person in a safe, separate environment. Do not test by restoring an old backup over your live site.

Priority concern: backups are disabled, incomplete, too old for the business, or nobody can explain how to restore them.

Next action / owner / due date: _____

04 Enquiries, bookings and sales

Can customers complete the important journeys, and does the business receive and act on the result?

Check and mark

- We have identified the journeys most important to the business.
Status ____
- We have tested those journeys from the customer's side, including on a phone.
Status ____
- Customers receive a useful confirmation after submitting or completing a transaction.
Status ____
- The enquiry, booking or order reaches the correct inbox or system.
Status ____
- Someone is responsible for responding, with cover when they are away.
Status ____
- Customer or member access works as intended.
Status ____
- We have agreed who repeats these checks and when.
Status ____

Run one complete test

Journey tested / page address: _____

Tested by / date / device: _____

Expected result: _____

Could the customer complete the journey? _____

Confirmation received or displayed? _____

Business inbox or system received the correct record? _____

Person responsible for follow-up / backup person:

Actual result / evidence location:

Issue found / person notified / retest date:

Next routine check / responsible person: _____

Ask your team

“Can we follow a test enquiry from submission through to the person responsible for responding?”

Label test enquiries clearly. Agree a safe method for purchasing or booking tests so you account for charges, stock, reserved appointments, notifications and clean-up.

Priority concern: the customer sees a success message, but the business receives nothing, a purchase cannot finish, or nobody monitors the destination inbox.

Repeat critical checks after significant changes. Busy sales and booking journeys may need checks much more often than the broader quarterly review.

Next action / owner / due date: _____

05 Documentation and continuity

Could another competent person understand the setup and keep essential work moving?

Check and mark

- The business has an accessible record of key accounts, renewals and access arrangements.

Status ____

- Support contacts and responsibilities are documented.
Status ____
- Important connected services and recurring manual tasks are recorded.
Status ____
- Recovery instructions are available when the website is unavailable.
Status ____
- Explain important decisions, including why unusual processes exist.
Status ____
- Someone else has checked that the handover information makes sense.
Status ____
- A named person updates the record when the setup or team changes.
Status ____

Capture the knowledge people rely on

Location of the handover record: _____

Who maintains it / last updated: _____

Main website support contact / responsibility:

Alternative contact or escalation route:

Task only one person currently knows how to do:

Who can explain it / who will document it / by when:

An important decision and why it was made:

Person who will check the record is understandable: _____

Ask your team

"If our usual website person were unavailable next week, what would we struggle to find, explain or complete?"

Start with the knowledge that would be hardest to replace. Include business processes and manual steps, as well as software. A brief explanation of why something works a particular way can save someone else hours of investigation.

Priority concern: the only copy of the instructions is in someone's head, personal inbox or inaccessible device.

Next action / owner / due date: _____

Your next three actions

Choose the gaps with the biggest business consequences. Give each action an owner, a date and a clear definition of "done".

For example: "Confirm the domain account and recovery contact with our provider."

Done means the details are verified and the approved access process is recorded.

Deal promptly with a known broken sales path, inaccessible critical account, or failed recovery arrangement. Seek professional help when the evidence is unclear, or the changes require technical expertise.

Action plan

Use the table below to agree your priorities. Add evidence of completion, rather than just marking an item finished.

Priority / action	Owner	Due date	Done when / evidence
1.			
2.			
3.			

Keep the record useful

Progress review date: _____

Next broad website control review: _____

Person organising that review: _____

Repeat the broad review quarterly, and after significant changes to staff, suppliers or the website. Schedule backups, alerts, and key cybersecurity checks based on risk, rather than waiting for the quarterly review.

Need a deeper review?

If this workbook reveals unclear ownership, uncertain recovery arrangements or systems that no longer support the business well, a website audit and strategy session can help you investigate and prioritise the next steps.

Contact Wil Brown at Zero Point Development:

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This workbook supports a practical business review. It is not a technical audit or a guarantee that a website is secure or recoverable.

