The 10-Point Efficiency Audit

A diagnostic tool for small businesses and non-profits.

Introduction

Technology should be a silent partner, not a source of friction. Use this checklist to identify where "technical debt" is slowing down your mission. If you find yourself checking fewer than 7 boxes, your systems are likely costing you more in time than they are providing in value.

Phase 1: File Hygiene & Accessibility

- [ ] **The Two-Click Rule:** Any staff member can find a core document (e.g., a 2024 budget or a standard contract) in under 15 seconds without asking for help.
- [ ] **Cloud Sovereignty:** No critical business data lives on "Desktops" or in "Downloads" folders. Everything is synced to a managed SharePoint or OneDrive environment.
- [ ] **External Offboarding:** There is a documented process for revoking file-sharing links when a contractor or partner project concludes.

Phase 2: Workflow & Automation

- [ ] **Version Control:** Your team has stopped using "Final_v2_Revised" filenames. You utilize live co-authoring and version history.
- [ ] **Notification Sanity:** Your inbox is free from internal "Update" notifications. Status changes and approvals are handled via automated Teams or Power Automate flows.
- [ ] **The Approval Loop:** Standard requests (expenses, time-off, or project sign-offs) are handled via a "One-Click" approval system rather than email threads.

Phase 3: Security & Recovery

- [ ] **The "Break-Glass" Sheet:** You have a physical or secure offline record of your Global Admin credentials for emergency recovery.
- [ ] **Universal MFA:** Multi-Factor Authentication is active for 100% of users, including part-time staff and volunteers.
- [ ] **License Audit:** You are not paying for "Ghost Licenses"—users who have left the organization but still have active, paid accounts.

Phase 4: The Human Metric

- [ ] **The Jargon Gap:** Your team describes your current tech stack as "helpful" or "invisible" rather than "frustrating" or "complicated."

Your Audit Result

- **8-10 Boxes:** Operational Clarity. Your systems are a competitive advantage.
- **5-7 Boxes:** Technical Friction. You are losing 3–5 hours per week to "manual tidy-up."
- **0-4 Boxes:** Technical Chaos. Your infrastructure is a bottleneck to growth.

Ready to tidy up?

If you checked fewer than 7 boxes, let's talk. TechTidy specializes in moving organizations from chaos to clarity with zero jargon and maximum efficiency.

Schedule a 15-Minute Discovery Call

Email: info4techtidy@gmail.com