



FREE CHECKLIST

Business Expansion IT Checklist

What to line up before you open a new location, take on an acquisition or hire fast.

INSIDE

10 areas from lead times to the first 30 days ·
a move-day plan · an owner and date tracker

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HOW TO USE THIS CHECKLIST

Growth plans usually account for the lease, the hires and the launch date. The technology often gets a few weeks at the end, and that's when an internet circuit turns out to need far longer than anyone expected.

Use this checklist for a new office or location, an acquisition, or a period of rapid hiring. Start as soon as the decision is likely, not when it's signed. Give each item an owner and a date, and use the tracker on the last page to keep everything in one place. Skip the items that don't apply to your kind of expansion.

Tip: work backward from opening day. Anything with a long lead time (internet service, building work, equipment orders) should start first, even before every detail is settled.

1. Network and connectivity lead times

- ☐ Check which internet providers serve the new address and order service early.
New business circuits can take weeks or months, especially if the building needs new cabling or construction. Ask each provider for a written install estimate.
- ☐ Plan a backup internet connection from a different provider or a different type of service.
- ☐ Walk the space for cabling, power, a secure spot for network equipment, and Wi-Fi coverage.
- ☐ Confirm who handles low-voltage cabling and whether the landlord must approve it.
- ☐ Decide how the new site connects to your existing systems and cloud services.
- ☐ Order firewalls, switches and access points early enough to configure and test before opening.
- ☐ For an acquisition: document the acquired company's network before changing anything.

2. Identity and access

- ☐ Decide whether new staff (or acquired staff) join your existing email and identity system, and when.
- ☐ Create accounts with multi-factor authentication turned on from day one.
- ☐ Set access by role: who needs which apps, shared drives and admin rights.
Copying another user's permissions is fast but often grants far more than the new person needs.
- ☐ For an acquisition: list every admin account, shared login and third-party access, and change ownership to your business.

- ☐ Write a standard onboarding and offboarding process if you don't have one. Rapid hiring exposes every gap in it.
- ☐ Plan building access (keys, badges, door systems) alongside system access.

3. Devices

- ☐ Count devices needed by role: laptops, desktops, monitors, docks, phones, tablets.
- ☐ Check supplier stock and shipping times before committing to a start date.
- ☐ Use a standard configuration so every device arrives with the same software, security settings and updates.
- ☐ Decide how devices get to remote or hybrid hires, and how they're returned.
- ☐ Plan printers, scanners, conference room equipment and any specialty hardware for the site.
- ☐ For an acquisition: inventory the acquired company's devices and flag anything out of support.

4. Phones and communication

- ☐ Decide whether the new site gets new numbers, keeps existing numbers or both.
- ☐ Start number transfers early. They depend on the current carrier and can stall on paperwork.
- ☐ Set up call routing, auto attendant, voicemail and after-hours handling for the new site.
- ☐ Update your website, email signatures, listings and client communications with the new location details.
- ☐ Agree how teams will message and meet across sites so nobody ends up on a separate tool.

5. Security baseline for the new site

- ☐ Apply the same security standards as your main location: multi-factor authentication, update schedules, endpoint protection and backups.
- ☐ Separate guest Wi-Fi from the business network.
- ☐ Secure network equipment in a locked space.
- ☐ Give new hires security awareness training during their first week.
- ☐ Extend monitoring and backups to the new site and confirm alerts reach the right people.

- ☐ For an acquisition: assess the acquired environment's security before connecting it to yours. Connecting first and checking later can bring someone else's problems straight into your network.
- ☐ Tell your cyber insurer about the new location or acquisition if your policy requires it.

6. Data and file access

- ☐ Decide where the new site's files will live and who can reach them.
- ☐ Test that line-of-business applications perform well from the new location before opening.
- ☐ Plan how any data from an acquired business will be moved, checked and cleaned up.
- ☐ Confirm retention rules for data you're inheriting, including records you must keep or delete.
- ☐ Make sure backups cover new file locations and new applications.

7. Compliance in new states

- ☐ Check data privacy and breach notification laws in each new state where you'll have staff, clients or data.
- ☐ Review client contracts for data location, security or notification requirements that change with a new site.
- ☐ Confirm industry rules that follow your data (for example health, financial or government contract requirements).
- ☐ Update policies, your incident response plan and contact lists to include the new location.
- ☐ For an acquisition: review the acquired company's existing obligations and any open compliance issues.

Our work supports your compliance program. It doesn't guarantee compliance, certification, or assessment results.

8. Vendors

- ☐ List every vendor touched by the expansion: internet, phones, IT support, software, cloud, security, landlord, movers, cabling contractors.
- ☐ Check whether current contracts cover a new location or more users, and what that changes in price or terms.

- ☐ For an acquisition: collect the acquired company's contracts, renewal dates and termination terms before deciding what to keep.
- ☐ Name one person who coordinates all vendors and owns the overall timeline.
- ☐ Get vendor contacts and escalation paths for move day in writing.

9. Move-day plan

- 1 Freeze changes**
No new software or major changes in the week before opening, except what's on the plan.
- 2 Confirm the basics**
Internet (primary and backup), Wi-Fi, network equipment and power are live and tested.
- 3 Test real work**
Have a few staff log in, print, call, open key apps and reach shared files from the new site.
- 4 Staff the day**
Have IT support on site or on call, with a clear way for staff to report problems.
- 5 Keep a rollback**
Know what happens if something critical fails, and who decides.
- 6 Log issues**
Record every problem, owner and fix so nothing gets lost in the rush.

10. The first 30 days after opening

- ☐ Review the issue log at the end of week one and close anything still open.
- ☐ Ask staff at the new site what isn't working. Small problems become habits quickly.
- ☐ Confirm backups ran and you can recover files from them for the new site.
- ☐ Check that every account, device and license is recorded in your inventory.
- ☐ Remove temporary access granted during setup, including vendor access.
- ☐ Cancel old services you no longer need, inside their notice periods.
- ☐ Update documentation: network diagrams, contacts, passwords stored securely, how-to guides.
- ☐ Hold a short review: what went well, what to change for the next expansion.

Owner and date tracker

Area	Owner	Start by	Done by	Done
Network and connectivity				☐
Identity and access				☐
Devices				☐
Phones and communication				☐
Security baseline				☐
Data and file access				☐
Compliance in new states				☐
Vendors				☐
Move-day plan				☐
First 30 days review				☐

Planning an expansion?

Expansions touch every part of your technology at once. Balancelogic plans the technology side of growth with you, from network design for a new site to coordinating the providers involved, so the technology is ready when the business is.

Book a free IT Strategy Session. Bring your target dates.

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