PLAN SET / 01

Small-business technology implementation starter pack

Fourteen printable pages for defining one technology change with the owners, dependencies, acceptance evidence, staged rollout, handoff, and way back visible.

CURRENT How the work operates today	TARGET One observable outcome	OWNER Who can approve and stop
EVIDENCE What must pass	ROLLBACK How usable work returns	REVIEW When temporary access closes

FREE EDUCATIONAL WORKSHEETS / NO PROJECT DATA IS SENT TO THIS SITE

A PLANNING STRUCTURE, NOT AN APPROVAL

Complete this pack where your business already protects project records.

Print a clean copy for one bounded change. Do not email completed pages through this site or place credentials, secrets, regulated data, security findings, or customer records in an unapproved environment.

1 / MAP

Walk one ordinary case through the current workflow. Record what is true, not what the process document says should be true.

2 / DEFINE

Write the target outcome, owner, boundary, dependencies, acceptance evidence, and stop conditions before configuration.

3 / REHEARSE

Use an approved representative sample. Compare ordinary work, exceptions, access, reports, exports, recovery, and timing.

4 / OPERATE

Transfer business-owned access and documentation. Close temporary permissions and exceptions on a dated review.

KEEP THESE PEOPLE IN THE ROOM

- [ ] Accountable business owner
- [ ] Person who performs the current work
- [ ] Data, privacy, security, and access owner
- [ ] Technical implementer or provider
- [ ] User acceptance and support owner
- [ ] Person who can declare rollback

WORKSHEET 01

Map one ordinary case before describing the solution.

Start with the trigger. Follow the actual handoffs, records, decisions, exceptions, and completion evidence. Attach a separate system diagram only if the business already protects it.

WORKFLOW BOUNDARY

This map begins when... and ends when...

STEP	OWNER	INPUT / RECORD	SYSTEM / FILE	DECISION / HANDOFF	PAIN / EXCEPTION

CURRENT EVIDENCE

What proves the work completed correctly?

MANUAL FALLBACK

How does work continue when a system or integration fails?

WORKSHEET 02

Describe what becomes observable, not what the product promises.

A target state names the user, workflow, measurable change, acceptance evidence, exclusions, and review date. It does not assume that a feature demonstration equals business value.

ONE-SENTENCE TARGET

After this change, [role] can [observable task] within [boundary], verified by [evidence].

IN SCOPE

Workflow, users, records, systems, and locations included.

OUT OF SCOPE

Decisions, data, systems, and exceptions excluded.

SUCCESS MEASURES

Baseline, target, observation period, and evidence owner.

NON-NEGOTIABLE CONSTRAINTS

Continuity, access, privacy, security, accessibility, contracts, budget, and timing.

REVIEW DECISION

Date, approver, approve / revise / stop, and next evidence required.

WORKSHEET 03

Name who decides, who verifies, and who can stop.

Separate business accountability from implementation work. A vendor can complete tasks, but the business must own acceptance, access, records, recovery, and the final operating decision.

DECISION / RESPONSIBILITY	ACCOUNTABLE	CONSULTED	EVIDENCE DUE	STOP / ESCALATION AUTHORITY

BUSINESS-CONTROLLED ADMINISTRATORS

Name at least two people and the recovery method.

TEMPORARY ACCESS CLOSURE

Who removes vendor, pilot, test, and elevated access, and when?

WORKSHEET 04

Expose what the rollout assumes will remain available and correct.

List systems, accounts, people, providers, devices, networks, records, policies, contracts, and deadlines. Add a row when one dependency can delay, distort, or block another.

DEPENDENCY	OWNER	NEEDED FOR	FAILURE SIGNAL	FALLBACK	REVIEW DATE

SINGLE POINTS OF FAILURE

Person, account, provider, device, or undocumented step.

OUTSIDE CHANGE WINDOWS

Renewals, provider releases, busy periods, audits, events, or contractual dates.

WORKSHEET 05

Name what enters, where it moves, who can change it, and how failure is seen.

Do not write actual credentials or sensitive records here. Record categories, owners, authoritative systems, role access, transfer direction, and the approved handling decision.

DATA / RECORD TYPE	SYSTEM OF RECORD	ROLE ACCESS	MOVES TO / FROM	INTEGRATION OWNER	HANDLING DECISION

PROHIBITED DATA

Categories that may not enter this system, tool, test, or provider.

RECONCILIATION

How missing, duplicate, stale, or unauthorized records are detected.

ACCESS REVIEW AND OFFBOARDING

Roles, separate administrators, temporary access, review date, and removal evidence.

WORKSHEET 06

Write the pass condition before the build is declared complete.

Test an ordinary case, an exception, role access, data comparison, reports, an integration failure, export, recovery, and a real user task. Save who tested, when, and what they observed.

SCENARIO	EXPECTED EVIDENCE	OBSERVED EVIDENCE	TESTER / DATE	PASS / DEFECT

OPEN DEFECTS AND EXCEPTIONS

Owner, consequence, workaround, due date, and acceptance authority.

ACCEPTANCE DECISION

Approve / conditional / reject, decision owner, date, and evidence location.

WORKSHEET 07

Run the full sequence on an approved representative case.

A rehearsal measures mapping, permissions, timing, communication, reconciliation, user work, support, and rollback before the cutover clock starts.

REPRESENTATIVE SAMPLE

Why this sample includes ordinary, edge, and failure cases.

SAFE ENVIRONMENT

Approved data, access, isolation, cleanup, and evidence location.

#	REHEARSAL STEP	OWNER	START / FINISH	OBSERVED RESULT	DEFECT / CHANGE

RECONCILIATION RESULT

Counts, key fields, relationships, permissions, reports, and exceptions.

ROLLBACK RESULT

Elapsed time, completeness, usability, communication, and remaining risk.

WORKSHEET 08

Expand only after the previous stage produces usable evidence.

Keep scope, users, access, support, monitoring, acceptance, stop conditions, and communication visible for each stage.

STAGE	SCOPE / USERS	OWNER	EVIDENCE TO EXPAND	STOP CONDITION	START	REVIEW

SUPPORT PLAN

Contact path, hours, response owner, known issues, and escalation.

COMMUNICATION PLAN

Who needs what message before, during, after, and on rollback.

CHANGE FREEZE AND APPROVAL

Configuration freeze, final evidence, accountable approver, time, and recorded decision.

WORKSHEET 09

Decide what triggers rollback before the team is under pressure.

Not every change can be fully undone. Define the last safe state, decision deadline, restored capability, data reconciliation, access changes, communications, and recovery evidence.

ROLLBACK TRIGGERS

Failed acceptance, missing data, access problem, outage, unusual impact, or unresolved dependency.

DECISION AUTHORITY AND DEADLINE

Who declares rollback, by what time, using which evidence?

#	RECOVERY ACTION	OWNER	EVIDENCE / RECORD	ELAPSED TARGET	COMPLETE

DATA RECONCILIATION

What changed after the last safe state, and how is it corrected?

RETURN-TO-SERVICE EVIDENCE

Which user, workflow, access, report, export, and recovery checks pass?

WORKSHEET 10

Close the project without leaving the provider as the only operator.

Verify business ownership of domains, billing, administrators, records, documentation, exports, recovery, support, and source materials. Move credentials only through an approved secure channel.

- [ ] Business owns domains, tenant, billing, subscriptions, and renewal contacts.
- [ ] At least two business-controlled administrators can sign in and recover access.
- [ ] Current architecture, systems, integrations, fields, permissions, and owners are documented.
- [ ] Configuration decisions, exceptions, known defects, and workarounds are recorded.
- [ ] Routine, exception, recovery, export, offboarding, and support procedures were demonstrated.
- [ ] Source files, templates, code, automations, licenses, and data exports were transferred.
- [ ] Backup restoration and the manual business path were tested.
- [ ] User training and accessible operating instructions match the production state.
- [ ] Vendor, test, pilot, and elevated access has an owner and removal date.
- [ ] The first post-launch review, support route, and escalation contacts are scheduled.

MATERIALS STILL DUE

Item, owner, consequence, due date, and temporary workaround.

FINAL ACCEPTANCE

Decision owner, date, evidence location, and retained vendor access.

ACCESS-REMOVAL RECORD

Account, permission, person, removal date, verifier, and evidence.

WORKSHEET 11

Review the real operating evidence after the launch pressure has passed.

Compare the observed workflow with the target outcome. Close temporary access, defects, exceptions, duplicate records, unused subscriptions, documentation gaps, and vendor dependencies.

REVIEW QUESTION	BASELINE / TARGET	OBSERVED EVIDENCE	OWNER / ACTION	DUE / CLOSE

VALUE AND BURDEN

Time, error, access, reliability, cost, support load, and user experience.

RISK AND RECOVERY

Incidents, exceptions, alerts, backup, export, access, and rollback readiness.

CONTINUE / REVISE / RETIRE

Decision, owner, evidence, and next review date.

TEMPORARY ACCESS CLOSED

Accounts, permissions, integrations, test data, and verification.

PRIMARY-SOURCE CONTEXT

Use official guidance as context, then verify your actual systems and obligations.

The worksheet structure and implementation sequences are original editorial synthesis. The sources below do not endorse this publication or certify a completed plan.

S01 **NIST Cybersecurity Framework 2.0**
nist.gov/cyberframework

S02 **NIST Small Business Cybersecurity Corner**
nist.gov/itl/smallbusinesscyber

S03 **NIST Privacy Framework**
nist.gov/privacy-framework

S04 **NIST AI Risk Management Framework**
nist.gov/itl/ai-risk-management-framework

S05 **CISA Secure Our World**
cisa.gov/secure-our-world

S06 **CISA Back Up Business Data**
cisa.gov/resources-tools/resources/back-business-data

S07 **FTC Start with Security: A Guide for Business**
ftc.gov/business-guidance/resources/start-security-guide-business

BOUNDARY

This pack is general educational guidance. It does not inspect systems, configure services, test vendors, certify security, verify compliance, replace contracts, or provide legal, privacy, security, accessibility, insurance, accounting, employment, or sector-specific advice. Keep completed sheets in an approved business environment.

Free library: smallbusinesstechsolutions.com