

Motley IT Assurance

Sample Small Business Technology Health Check Report

This sample shows the style and structure of the report a client would receive after an onsite assessment.

Client	Sample Office, LLC
Assessment Date	October 2026
Scope	Up to 10 Windows computers + basic network review
Overall Snapshot	Several moderate-risk issues identified; no critical emergency discovered

Executive Summary

The environment was generally functional, but several gaps were found that could lead to downtime, data loss, or wasted labor. The most important priorities are improving backup confidence, reducing unnecessary administrator access, reviewing patching consistency, and identifying repetitive workflow tasks that may be automated or simplified.

Priority Findings

Area	Risk	Observation
Backup confidence	Medium	Backups appear to run, but restore readiness has not been recently verified.
Patching / updates	Medium	Several systems showed delayed updates or inconsistent maintenance.
Administrative access	Medium	At least one user routinely works with elevated local permissions.
Drive/storage health	Low	No immediate failures observed, but one system was close to storage limits.
Process efficiency	Medium	Manual document handling and duplicate data entry suggest automation opportunities.

Risk key	High	Medium	Low
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Recommended Next Steps

1. Verify that at least one critical backup can be successfully restored.
2. Standardize Windows update routines and note any unsupported software.
3. Review who truly needs local administrator access and remove it where unnecessary.
4. Evaluate repeated manual tasks for simple automation or process cleanup.
5. Review software subscriptions and recurring tools for possible consolidation or cost reduction.

Example Detailed Finding

Finding: Manual file handling and duplicate entry slow office operations

Observation: Staff members routinely re-enter client information across multiple tools and handle documents in a way that increases wait time and the chance of mistakes.

Why it matters: This may not appear as a technical outage, but it increases labor cost and slows service. It can often be improved with better workflow design, simple automation, or reduced duplication.

Suggested action: Map the current process, identify the repeated steps, and test whether a single source of truth, intake form, shared workflow, or AI-assisted workflow can reduce the manual effort.

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Mike Motley • (813) 720-7912 • mike@motleyitassurance.com • motleyitassurance.com