Cybersecurity Priorities

A Conversation Checklist

Use this worksheet before a cybersecurity purchase, renewal or planning discussion. Bring your notes to your internal team or current providers. Start with one business concern. Write “not yet confirmed” where you need an answer.

Date: _____ Discussion topic: _____

1. Define the business concern

- ☐ Name the operation that matters, such as order processing or customer service.
- ☐ Discuss what disrupted access, unauthorized changes or exposed information would mean for that operation.

Operation and concern: _____

Why it matters to the business: _____

2. Review what is already in place

- ☐ Identify the tools or services relevant to this concern, including existing providers.
- ☐ Ask what is included, where it applies and what evidence can confirm the scope.

Current tool or service: _____

Document or report to review, and its date: _____

Question we still need answered: _____

3. Clarify who does the work

- ☐ Ask who maintains the capability, reviews its output and decides on action.
- ☐ Confirm how the internal team and providers communicate and cover absences.

Responsibility or handoff to clarify: _____

Person or team to ask: _____

Keep your notes safe. Do not record passwords, credentials, account numbers, detailed network information or sensitive incident details here.

4. Identify dependencies and practical limits

- ☐ Ask about required integrations, staff time, provider involvement and ongoing work.
- ☐ Note what remains unverified. If recovery is the concern, ask what the latest backup or recovery test covered.

Dependency or constraint to discuss: _____

Information needed before a decision: _____

5. Agree on the next step

- ☐ Describe the outcome you want and the evidence that would support a decision.
- ☐ Consider whether the next step is clarification, further review, a change to an existing arrangement or a new purchase.

Outcome we want: _____

Evidence or answer we need: _____

Capture the follow-up

Next action: _____

Person or team following up: _____

Revisit on: _____ **Decision still open:** _____

Use the notes in your next conversation

Keep a copy for your team and discuss relevant questions with your existing providers. A checked box means you covered a discussion topic. It does not mean a safeguard is effective or a risk has been resolved.

To discuss your priorities with OPTRIC, visit optric.com/contact.html.

About this worksheet. This educational conversation guide does not test systems, identify all security gaps, certify compliance or replace a security assessment.

Further reading:

NIST Cybersecurity Framework 2.0
NIST Small Business Quick-Start Guide
NIST Organizational Profiles Quick-Start Guide