

# SMB Data Privacy Checklist

TechEd Analyst Template | Version 1.0

*Use this as a starting point to get organized. It is not a compliance determination and does not tell you which laws apply to you — that depends on your specific business and is a question for your attorney.*

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## 1. Data inventory — what you hold

We have a written list of the types of personal data we collect.

We know why we collect each type (the business purpose).

We know which data is "sensitive" ([health], [financial], [biometric], [precise location], etc.).

We collect only what we use ([review and trim annually]).

## 2. Storage & access — where it lives, who can reach it

We know where each type of data is stored ([tool/system]).

Access is limited to people who need it ([roles]).

We have a way to delete data when it's no longer needed.

Backups and exports are accounted for, not forgotten.

## 3. Vendors & tools — what your tools do with your data

We have a list of vendors/tools that touch personal data.

We've checked what each vendor does with the data ([read the data terms]).

We know which tools use our data to train AI/LLMs, if any.

We have agreements or terms on file for the vendors that matter.

## 4. Internal handling — team rules

We have a written rule for what staff may and may not paste into AI tools.

New team members are told the data rules ([onboarding step]).

There's one named owner for data questions ([owner]).

## 5. Incident basics — if something goes wrong

We know who to call first ([owner], [attorney]).

We have a rough plan for notifying affected people if required ([check with counsel]).

We log what happened and what we changed.

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*This is a customizable operational checklist for general use. It is not legal, financial, or compliance advice, and completing it does not make your business compliant with any law. You are responsible for how you apply it. For obligations specific to your business, consult a licensed attorney.*

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