

TECHNOIDS TECHNOLOGY SECURITY REVIEW SERIES

Law Firm Technology Security Checklist

A practical review worksheet for client confidentiality, email security, Microsoft 365, remote work, continuity, and cyber-insurance readiness.

YES / NO / NOT SURE / N/A

This is not a pass/fail cybersecurity test.
A No or Not Sure identifies an area worth understanding more closely.

Technoids Techs

Knowledge Is Part of Protection.

Digital Technology. Real-World Care.

Law Firm Technology Security Checklist

Knowledge Is Part of Protection. Use this worksheet to review the technology and security areas that commonly matter to law firms: confidential client information, identity, Microsoft 365, business email compromise, endpoint security, remote work, backup and recovery, client requirements, and cyber-insurance readiness.

How to use this checklist	Review each question and mark the answer that best reflects your current visibility. The goal is not to score your firm. The goal is to identify what you understand, what may need attention, and what would be useful to discuss with Technoids Techs.	
Firm _____ _____	Completed by _____	Date _____

YES	A control or process appears to exist.
NO	An area may deserve further evaluation.
NOT SURE	An area where visibility may be missing.
N/A	Not applicable to your environment.

This is not a pass/fail cybersecurity test. A No or Not Sure identifies an area worth understanding more closely.

Client Information

Review question	YES	NO	NOT SURE	N/A
Do we know where confidential client information is stored?				
Do we know which employees can access it?				
Is access based on role or responsibility?				
Are former employees promptly removed?				

Identity & Microsoft 365

Review question	YES	NO	NOT SURE	N/A
Is MFA enabled?				
Does every professional have an individual account?				
Is Microsoft 365 centrally administered?				
Are administrator privileges restricted?				
Are suspicious sign-ins monitored?				

Email & Business Email Compromise

Review question	YES	NO	NOT SURE	N/A
Is email protected by advanced filtering/security?				
Do employees know how to recognize impersonation attempts?				
Is there a process for verifying changes to payment instructions?				
Do employees know how to report suspicious messages?				
Are email accounts protected with MFA?				

Endpoint & Remote Work

Review question	YES	NO	NOT SURE	N/A
Are laptops/workstations centrally managed?				
Are devices encrypted?				
Are endpoints monitored by security tools?				
Are security updates centrally managed?				
Are remote workers using appropriately secured devices?				
Do we have a lost-device process?				

Backup & Business Continuity

Review question	YES	NO	NOT SURE	N/A
Is critical client information backed up?				
Does recovery planning include Microsoft 365 where appropriate?				
Are backups protected from unauthorized modification?				
Have we tested recovery?				
Do we know which systems must be restored first?				
Do we have a continuity plan for technology outages?				

Client Requirements & Insurance

Review question	YES	NO	NOT SURE	N/A
Can we accurately answer client security questionnaires?				
Do we maintain appropriate cybersecurity documentation?				
Do we periodically review technology/security risk?				
Do we have an incident-response process?				
Can we substantiate answers on our cyber-insurance application?				

What Did You Discover?

This checklist is not designed to give your firm a cybersecurity grade. Technology environments are too different for a simple score to tell the entire story. Instead, look at your answers and use them to guide the next conversation.

YES	_____	NO	_____
NOT SURE	_____	N/A	_____

How to Interpret Your Answers

YES	A control or process appears to exist.
NO	An area may deserve further evaluation.
NOT SURE	An area where visibility may be missing.
N/A	Not applicable to your environment.

Do not start with the product. Start with the questions: What are we protecting? Who has access? Which technology do we depend on? Where are our largest risks? What do we not know? What should we address first?

Areas I Want to Review

1. _____
2. _____
3. _____

Questions for Technoids Techs

1. _____
2. _____
3. _____
4. _____

Want Help Reviewing Your Answers?

Bring your completed checklist to a Technoids Technology & Security Review. We'll help you understand what your answers may mean, which areas deserve closer attention, and what practical next steps may make sense for your firm.

Schedule a Technology & Security Review

Technoids Techs

Knowledge Is Part of Protection.

Digital Technology. Real-World Care.

Practical managed technology, cybersecurity, compliance support, and planning for organizations where digital systems affect real people, real responsibilities, and real operations.

Educational-use disclaimer: This checklist is provided for general educational purposes and is not a certification, audit, legal opinion, regulatory determination, or guarantee of cybersecurity or compliance. Organizations should consult appropriate legal, regulatory, insurance, or compliance advisors for requirements specific to their situation.