

## FREE CHECKLIST · FOR LONDON RECRUITMENT FIRMS

# The recruitment firm IT checklist.

New starters, leavers, and the monthly checks that keep candidate and client data secure. Print this and keep it next to your onboarding process, or use it as a quick gut check on where things stand today.

## 01 New starter: before day one

- ☐ Laptop built, named, and tested
- ☐ Email account created and added to the right distribution lists
- ☐ CRM / ATS login created, with the correct permission level for their desk
- ☐ Phone system extension or softphone set up and tested
- ☐ Access to shared drives or folders for their team, not the whole company
- ☐ Licensed tools requested in advance, including job boards, LinkedIn Recruiter, and e-signature

## 02 New starter: day one and week one

- ☐ Multi factor authentication set up there and then, not left for "later"
- ☐ Password manager access given, if your firm uses one
- ☐ Quick walkthrough of how to raise an IT issue
- ☐ Confirm they can access everything their desk actually needs

### WHY THIS MATTERS

A new consultant who can't log into the CRM on day one is losing billable time before they've made a single call. Provisioning should be a checklist, not a scramble.

## 03 Leaver: on their last working day

- ☐ Revoke CRM / ATS access on their actual last day, not "when IT gets to it"

- ☐ Suspend email access, and set up forwarding or an auto reply if needed
- ☐ Remove from shared drives, job boards, and e-signature or LinkedIn Recruiter seats
- ☐ Collect company devices where possible
- ☐ Check for personal cloud storage synced to a company laptop

#### 04 Monthly, ongoing

- ☐ Confirm multi factor authentication is still switched on for everyone
- ☐ Review who has access to what, and remove anything that's no longer needed
- ☐ Check backups, and test a restore at least twice a year
- ☐ Confirm your identity system (Microsoft 365 / Google Workspace) is the single source of access

##### WHY THIS MATTERS

Recruitment has some of the highest staff turnover of any sector. Every departure is a window where old access sits open on a system full of candidate and client data, so offboarding needs to be routine, not an afterthought.

### Not sure where your firm actually stands?

This checklist covers the basics. Our free 9-point IT health check goes further, with a score across security, support and infrastructure, specific to your setup.

Take the free health check → [tectiv.co.uk/health-check](https://tectiv.co.uk/health-check)

Or message us directly → [wa.me/447977071778](https://wa.me/447977071778)