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Is Your Agency Secure?

A Quick Security Check for Creative Teams

A plain-English checklist to help your creative agency spot security gaps, reduce risk, and protect client trust.

Creative teams move fast. Files fly between tools — Macs, Windows, personal devices, freelancers, shared logins, cloud apps.
That flexibility fuels creativity, but it also creates risk.

Attackers know agencies handle client data, rely on email and cloud tools, and often lack dedicated security staff. They look for gaps that stay hidden until something breaks (or a client's work gets exposed).

This self-check helps you spot risks before they become downtime, lost trust, or insurance problems.

What this is:
A 10-minute gut-check to spot risks before they become problems.

How to use it:

- Be honest. "I think so" usually means it's not documented.
- You don't need to be technical.
- Not knowing an answer tells you something (it's not a failure).

What you'll learn:
Your biggest risks, what's already working, and where you actually stand.

Let's get started!

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Section 1: Devices & Access (Mac + Windows Friendly)

□ Every employee device (Mac or Windows) is encrypted
□ Lost or stolen devices can be remotely locked or wiped
□ Admin access is limited (not everyone is an "admin")
□ Personal devices accessing company files follow security rules

Why it matters:
Creative agencies often rely heavily on Macs and mobile devices. Without consistent controls, one lost laptop can expose client data.

Section 2: Passwords & Identity

□ Multi-factor authentication (MFA) is enforced everywhere
□ Passwords are not shared between team members
□ Departed employees and freelancers are removed the same day
□ A password manager is used (not browsers or sticky notes)

Why it matters:
Most breaches start with stolen or reused credentials.

Section 3: Email & Phishing Protection

□ Employees receive regular phishing awareness training
□ Suspicious emails are reported, not ignored
□ Email filtering is in place beyond default settings
□ Client-facing email accounts have extra protections

Why it matters:
Agencies are prime phishing targets because attackers can impersonate clients, vendors, or internal team members.

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Section 4: File Sharing & Collaboration

□ Cloud storage access is restricted by role
□ Files aren't shared using "anyone with the link"
□ External collaborators have time-limited access
□ Old project folders are archived or locked

Why it matters:
Creative files often live forever, especially long after projects end. That's unnecessary exposure.

Section 5: Backups & Business Continuity

□ Critical files are backed up automatically
□ Backups are tested often
□ Backups can't be overwritten by ransomware
□ You know how long recovery would actually take

Why it matters:
Backups are all about uptime, deadlines, and client commitments.

Section 6: Vendors, Tools & Shadow IT

□ You know every major tool your team uses
□ Security settings are reviewed during onboarding
□ Client tools are separated from internal systems
□ New tools are approved before use

Why it matters:
Unapproved tools create blind spots, which is where breaches hide.

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Section 7: Leadership & Accountability

- ☐ Someone owns security decisions (even part-time)
- ☐ Security is reviewed at least annually
- ☐ You know what your cyber insurance requires
- ☐ There's a documented incident response plan

Why it matters:
Security without ownership is just hope.

Scoring & Interpretation

More than 21 checks:
You're ahead of most agencies!
Security still requires ongoing attention.

14–21 checks:
You're doing some things right, but gaps could create real risk.

Fewer than 14 checks:
Your agency is exposed, not because you're careless, but because security hasn't been structured. We can help.

Important note:
Most agencies land in the middle. That's normal and *100% fixable.*

What's Next?

Most agencies don't need more tools. They need security that fits how creative teams actually work. At Preferred, we help agencies reduce risk, protect client trust, and stay productive without friction.

Want a second opinion?
If this checklist raised questions, let's talk. We'll assess your risk and help prioritize next steps. **Visit our website** or give us a call at **708-781-7110** to schedule a 15-minute strategy call with our team today.