The Cannabis IT Readiness Checklist

15 questions every dispensary, cultivator, and processor in a Metrc state should be able to answer about its technology and compliance. Each has a Green, Yellow, and Red answer and one next step. Allow about 15 minutes.

HOW TO USE THIS SHEET

Every question has three answers. Tick the box beside the one that matches your business today: Green means you are in good shape, Yellow is worth fixing soon, and Red should be addressed first.

When you have answered all 15 questions, count the ticks of each color, write the totals on the Score yourself page, and fill in the action plan on the last page.

1. Cannabis labeling and compliance

Three questions on labels, COAs, and per-state rules. KawaConnect is a licensed Metrc integrator and makes Tagestry, a label platform for Metrc states. See our IT services for cannabis operators (kawaconnect.com/cannabis-it/).

Q1. Are Metrc labels printed through a validated integration that records who printed what, when, and from which template?

- ☐ GREEN — Label software with a Metrc integration (we make Tagestry) that logs every print to a package UID, lets you recover a mislabel, and keeps the audit trail for the full retention window.
- ☐ YELLOW — Generic label software with manual Metrc field entry. Misprints occasionally cause holds.
- ☐ RED — Hand-typed labels or screenshots from Metrc pasted into Word.

Next step: Move label printing to software with a Metrc integration. Tagestry syncs package data from Metrc and keeps an audit log for every print.

Q2. Are Certificates of Analysis (COAs) linked to specific Metrc packages and to the menu the customer sees?

- [ ] GREEN — COA PDFs auto-attach to packages on receipt, menu QR codes resolve to the right COA per batch, and the linkage survives a label reprint.
- [ ] YELLOW — COAs in a Google Drive folder. The right COA per package requires a manager to look it up.
- [ ] RED — Customer asks for a COA, staff guesses.

Next step: Link COAs to package UIDs instead of SKUs. Tagestry stores the COA reference with each print, so a relabel keeps the link.

Q3. If you operate in more than one state, do you maintain a per-state compliance matrix (tag rules, retention, reporting)?

- [ ] GREEN — A maintained document covers the differences across each Metrc state you hold a license in. Staff training is state-specific.
- [ ] YELLOW — You assume the rules are similar enough. Surprises happen at audits.
- [ ] RED — Multi-state operator running single-state SOPs.

Next step: Build a state-by-state matrix of tag formats, retention windows, and inspection schedules. Tagestry handles the label formats for each state.

2. Market intelligence and competitive data

Three questions on what you can see of the market beyond your own menu. We built PryceHawk, our market data product, to answer them.

Q4. Can you view your products (and your competitors' products) across multiple dispensaries, or pull data for an entire state?

- [ ] GREEN — You query a market data feed (PryceHawk / CannQuest API, BDSA, Headset) by brand, SKU, or product across hundreds of stores in a state, with daily refresh.
- [ ] YELLOW — A staffer opens a few competitor menus by hand on Monday and writes notes.
- [ ] RED — You see your own menu only.

Next step: PryceHawk tracks more than 400 dispensaries across Ohio and Pennsylvania on nine platforms. A read-only API key gives you cross-store data without anyone opening menus by hand.

Q5. Do you know when a competitor cuts price or runs a new promo on a product you also carry?

- [ ] GREEN — Daily undercut and discount alerts on the SKUs that matter to you. The buyer adjusts before the customer notices.
- [ ] YELLOW — You find out when a regular tells you the place down the street is $5 cheaper.
- [ ] RED — No competitor price tracking at all.

Next step: Subscribe to a retail competitor report (PryceHawk emails undercut analysis, discount breakdowns, and THC comparisons by store). Start with daily alerts on your top 50 SKUs.

Q6. For your cultivation or wholesale arm, do you track which dispensaries pick up new brands and which let them lapse?

- [ ] GREEN — A daily wholesale tracker (brand inventory across stores, new-listing and delisting alerts) feeds the rep team's Monday standup.
- [ ] YELLOW — Reps ask buyers in person and trust the answers.
- [ ] RED — You learn a chain dropped your brand months later.

Next step: Use a wholesale presence report (PryceHawk tracks new listings, delistings, and shelf coverage per brand company) so reps hear about a delisting soon after it happens.

3. Video surveillance and physical security

State rules set how licensed cannabis sites record and keep video. These three questions cover retention, outages, and exports.

Q7. Does video retention meet the strictest state rule applicable to any of your licenses?

- [ ] GREEN — Storage is sized for the longest retention period required by any license you hold, and you have the current rule for each state in writing.
- [ ] YELLOW — Retention meets the rule in one state, but you also hold a license in a state that requires longer.
- [ ] RED — Retention is whatever the recorder defaults to.

Next step: Check your state's camera retention rule and size storage to meet it. If you hold licenses in more than one state, size for the longest period.

Q8. Are camera outages detected and alerted automatically, with logs retained for inspections?

- [ ] GREEN — The NVR sends health alerts to ops; outages logged with start and end timestamps. The maintenance log goes back at least a year.
- [ ] YELLOW — Outages are noticed when someone reviews footage and finds a gap.
- [ ] RED — No monitoring. A regulator notices first.

Next step: Many current camera platforms (Verkada, Eagle Eye, Hanwha Wisenet) include health alerting. Turn it on and route it to a monitored inbox.

Q9. Can you produce authenticated video exports for a regulator within their stated deadline?

- [ ] GREEN — A tested export workflow. Authenticated MP4 with a hash, timestamps preserved. The manager has completed one for a regulator inquiry.
- [ ] YELLOW — Export works in theory, no one has done a real one in a year.
- [ ] RED — You would search for how to export from the recorder on the day a regulator asks.

Next step: Run a quarterly export drill. Save the runbook to the same folder as the SOPs.

4. Network segmentation and cybersecurity

The POS, the compliance machines, and the cameras should not share a network with guest Wi-Fi. These three questions cover network separation, sign-in, and endpoint protection.

Q10. Are POS, cameras, compliance machines, and guest Wi-Fi on separate VLANs with access control?

- [ ] GREEN — Layered design: VLAN 10 corporate, 20 POS, 30 Metrc and compliance, 40 cameras, 50 guest. Inter-VLAN traffic denied by default.
- [ ] YELLOW — A guest SSID exists, everything else is on one flat LAN.
- [ ] RED — Single flat network. The guest who connects to Wi-Fi can ping the POS.

Next step: With a current firewall and managed switches (Ubiquiti UDM, pfSense plus UniFi, Meraki MX), this takes about an afternoon at a single store.

Q11. Is MFA required on POS admin, Metrc, banking, email, and every regulator-portal login?

- [ ] GREEN — MFA enforced, phishing-resistant on admin and Metrc accounts where the platform supports it.
- [ ] YELLOW — MFA on email, password-only on POS admin and Metrc.
- [ ] RED — Shared budtender logins, password posted on the back-of-house wall.

Next step: Give each employee their own POS account and require MFA on every admin role.

Q12. Are EDR and patching enforced on POS endpoints and the Metrc workstation?

- [ ] GREEN — Managed EDR (Huntress, SentinelOne, Defender for Business with a SOC) on every POS terminal. OS and POS-software patches within 14 days of release.
- [ ] YELLOW — Antivirus exists, patching is manual, the Metrc machine has not been rebooted in months.
- [ ] RED — Built-in AV only. Patches when the POS vendor pushes them.

Next step: Put managed EDR on every POS terminal and the Metrc workstation, with a person reviewing the alerts, and set a patch schedule.

5. Operations, training, and inspection readiness

The last three questions cover inspection drills, staff training, and offboarding.

Q13. Could you produce a complete Metrc export, lab COAs, and the camera footage a regulator asks for within their deadline?

- [ ] GREEN — An inspection runbook tested twice a year. The compliance manager has done a mock drill in the last 90 days.
- [ ] YELLOW — You could do it but it would consume a full day of the entire ops team.
- [ ] RED — You would call your lawyer and try.

Next step: Run a mock inspection every quarter and time it. Fix whatever slowed you down before the next one.

Q14. Have budtenders, cultivators, and processors had phishing-awareness training in the last 12 months?

- [ ] GREEN — Five-minute monthly modules, simulated phish quarterly. Training tracked by employee in HR.
- [ ] YELLOW — One-time training at hire.
- [ ] RED — No training. The compliance manager has clicked a real phish in the last year.

Next step: Start five-minute monthly training with a simulated phish each quarter, and track completion per employee.

Q15. Is there a documented offboarding process that revokes POS, Metrc, banking, and physical access within one business day?

- [ ] GREEN — A checklist that covers per-employee POS, Metrc user, banking signers, alarm codes, key fobs, and M365/Google.
- [ ] YELLOW — Email and POS get disabled fast, the Metrc user lingers for weeks.
- [ ] RED — Former budtenders may still have a working login.

Next step: Build a one-page offboarding checklist this week, and put removing the Metrc user at the top.

Score yourself

Count how many of each color you ticked across the 15 questions and write the totals in the boxes. Then tick the band that matches your result.

GREEN	YELLOW	RED
_____	_____	_____
out of 15	out of 15	out of 15

- [ ] **13 or more Green:** you are in good shape. Keep it that way with a quarterly export drill, an annual policy review, and a weekly market-data review.

- [ ] **8 to 12 Green:** the basics are mostly there. Pick your three most serious Yellows and close them within 90 days.

- [ ] **Under 8 Green, or any Red on Q1, Q7, Q10, or Q11:** fix any Red on those four questions first, then the rest of your Reds, then the Yellows.

A Red on Q1, Q7, Q10, or Q11 puts the whole result in the Red band, however many Greens you have.

Action plan

Write down the five things you will fix first. Start with any Red on a critical question (Q1, Q7, Q10, or Q11), then your other Reds, then your Yellows. Use the next step printed under each question as the starting point.

PRIORITY	WHAT TO FIX	WHO OWNS IT	TARGET DATE	DONE
1				☐
2				☐
3				☐
4				☐
5				☐

Get a second opinion

KawaConnect builds IT and data tools for cannabis operators. We make Tagestry, a label platform for Metrc states, and PryceHawk, which tracks more than 400 dispensaries across Ohio and Pennsylvania. The 30-minute readiness call is free. Walk us through your answers and we will tell you what we would fix first. Read more about our IT services for cannabis operators (kawaconnect.com/cannabis-it/).

Book a free readiness call: kawaconnect.com/contact/ | sales@kawaconnect.com | (412) 556-7007