

Essential Business Documents Every Business Owner Should Have

Department - Finance



- Financial Statements
- Budget & Bookkeeping records
- Forecast
- Tax return report
- Payroll report/records
- Financial policies & procedures
- Cash flow report
- Accounts payable/
receivable report
- Capital expenditure plan

Essential Business Documents Every Business Owner Should Have

Department - Sales & Marketing



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Sales plan

Marketing plan

Customer profiles

Competitive analysis

Product catalog

Sales collateral

Advertising plan

Lead generation Plan

Sales Forecast

Essential Business Documents Every Business Owner Should Have

Department - Human Resource



- Employee handbook

- Job descriptions

- Employee contracts

- Performance evaluations

- Employee files

- Benefits enrollment forms

- Time-off request forms

- Employee complaint forms

- Compliance documents

Essential Business Documents Every Business Owner Should Have

Department - Operations



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Business process flowcharts

Standard operating procedures (SOPs)

Work instructions

Production schedule

Inventory management plan

Capacity utilization report

Maintenance schedule

Logistics plan

Health and safety plan

Essential Business Documents Every Business Owner Should Have

Department - Information Technology



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- IT Strategic plan
- IT Policies and procedures
- IT Asset inventory
- IT Disaster recovery plan
- IT Service level agreement (SLA)
- IT Security plan
- IT Maintenance schedule
- IT Project plan
- IT Compliance report

Essential Business Documents Every Business Owner Should Have

Department - Legal



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- Shareholder agreement
- Legal Research
- Legal briefs and memorandum
- Litigation documents
- Intellectual property documents
- Compliance documents
- Insurance policies
- Legal correspondence
- Legal briefs

Essential Business Documents Every Business Owner Should Have

Department - Customer Service



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Service level agreement (SLA)

Customer service scripts

Customer feedback forms

Customer complaint forms

Knowledge base

Escalation procedures

Training manuals

Customer Service metrics

Customer service reports

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**Thank
you!**

STAY IN TOUCH

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