

Request for Information: Checklist

This checklist outlines the base information for conducting an operational audit. Expand upon this document based on your specific needs. Best of luck!

Systems & Tools Access

- ☐ Project Management Software
- ☐ Time Tracking System
- ☐ Finance System
- ☐ Internal Communications System

Business Documentation

- ☐ Project/Product Roadmaps
- ☐ Historical Business/Strategic Plans
- ☐ Existing SOPs
- ☐ Minimum Viable Product Write-up
- ☐ Process Documentation / Templates
- ☐ Executive Reporting Samples
- ☐ Client & Retention Information

Sales & Marketing

- ☐ CRM Access
- ☐ Contract Samples
- ☐ Sales Pipeline
- ☐ Sales Cycle Documentation
- ☐ Pitch Deck

Financial Reports

- ☐ Balance Sheet as of July 31st
- ☐ Current Accounts Receivable Report
- ☐ List of Recurring Charges
- ☐ Current Accounts Payable Report
- ☐ P & L for June
- ☐ P & L for July
- ☐ P & L YTD
- ☐ Budget

Personnel

- ☐ Organizational Chart
- ☐ List of Employees
- ☐ Performance Reviews
- ☐ Onboarding Documentation
- ☐ Training Materials
- ☐ Employee Training Policy
- ☐ Personal KPIs