List of Systems Needs

Forms, Templates, Procedures, Checklists, Policies, Lists

Client onboarding

* Engagement letter, contract, or terms of service
* Privacy policy
* Invoice, accompanying email, receipt
* Welcome letter including onboarding instructions and client policies and procedures
* Client intake document
* Thank you letter and procedure
* Client checklist of services

Client service

* Email draft answers for frequently asked questions
* Client procedures master shell
	+ Detailed, customized client procedures for each client
* Change request procedure, change order
* Training aids, tips sheets, videos
* Software login instructions and explanations
* Production calendar
* Project management system update process

Client termination

* Client disengagement letter, process

Marketing

* Marketing plan for each channel
* Channel reports and ratios
* Customer referral source spreadsheets
* Ideal client spreadsheets
* Niche spreadsheets
* Referral request
* Referral program notification
* Referral acknowledgement procedure
* Email draft answers of frequently asked questions
* Web site plan and update procedure
* Promotion calendar
* Trade show calendar
* Open house procedure, invitation drafts, speaker’s template
* Newsletter procedure
* Blog update procedure

Sales

* Prospect kit
* Client information gathering form
* Sales scripts
* Leads sheets
* Conversion reports and ratios
* Proposal shells
* Pricing instructions

Hiring/ Staffing

* Interview questions bank
* Job ad
* Job descriptions
* Performance evaluation form and review procedure
* Holidays
* Job offer letter and supplemental agreement
* Annual benefits changes – vacation, PTO, bonuses, work-from-home schedule, hours
* Training
* Travel policy
* Employee onboarding packet with W-4, I-9, etc. and policies
* New hire reporting
* Posters
* New hire procedure including credit cards, keys, parking, insurance, email, and software setup
* Timesheet and how to charge time
* Equipment and furniture acquisition, seating assignment

Facilities

* Emergency preparedness: first aid kit, fire extinguisher, fire exit plan, nearest hospital, ambulance contact, etc.
* Parking
* Keys
* Kitchen supplies list, buying and re-order points
* Employee posters, ordering and displaying
* Water
* Thermostat
* Yard maintenance
* Cleaning crew
* Landlord
* Furniture

IT

* Disaster recovery procedures including offsite backups and system restores
* PCs, hardware and software license documentation, access and passwords
* Equipment release form (for employees taking equipment home)
* Client data security
* Software selection
* Planned projects
* Training
* Network
* Email
* Password management
* Vendor inventory and management
* Software inventory and management

Accounting

* Internal accounting software and user access
* Chart of accounts
* Accounts payable process
* Customized instructions for routine payments
* Ordering checks, check stock, deposit slips
* Banking
* Credit cards
* Merchant account and compliance
* Reconciliations
* Report generation
* Exception reporting
* Transaction posting
* Customer master information
* Vendor master information
* Payroll and employee master
* Invoice template
* Invoicing approval and distribution process
* Aged receivables collection and escalation process

Admin

* Mail
* Appointment scheduling email drafts, calendar rules
* Phone greeting, message checking
* Insurance summary with policies, renew dates, and contacts
* Company communications
* Client communications
* List management
* Research

Executive

* Software partnerships and arrangements
* Partnerships contracts and procedures
* HR liaison
* Compensation
* Planning
* Strategy