



TOP 50 DOCUMENTS & VISUAL ASSETS

A SMALL BUSINESS TYPICALLY NEEDS

A practical checklist of essential files every well-organized business should create and use.

PRIORITY GUIDE

Essential – Must have

High – Very important

Situational – As needed

STRATEGY & MANAGEMENT

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	1	Business Plan	
☐	2	One-Page Strategy	
☐	3	90-Day Operating Plan	
☐	4	KPI Dashboard / Scorecard	
☐	5	Organization Chart	
☐	6	Decision & Approval Authority Matrix	

LEGAL, RISK & COMPLIANCE

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	7	Business Formation & Ownership Records	
☐	8	Business Licenses & Permits	
☐	9	Contract / Agreement Templates	
☐	10	Insurance Policies & Certificates	

FINANCE & ACCOUNTING

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	11	Profit & Loss Statement	
☐	12	Balance Sheet	
☐	13	Cash-Flow Statement	
☐	14	13-Week Cash Forecast	
☐	15	Annual Budget	
☐	16	Accounts Receivable & Payable Aging	
☐	17	Pricing & Unit-Economics Model	
☐	18	Invoice Template	
☐	19	Estimate / Quote Template	
☐	20	Purchase Order / Expense Form	

MARKETING & BRANDING

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	21	Marketing Plan & Calendar	
☐	22	Brand Guidelines	
☐	23	Logo Asset Package	
☐	24	Business Card	
☐	25	Sales / Promotional Flyer	
☐	26	Company Brochure	
☐	27	Product / Service Sell Sheet	
☐	28	Sales Presentation / Pitch Deck	
☐	29	Email Marketing Template	
☐	30	Promotional Email Ad	

MARKETING & ADVERTISING ASSETS

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	31	Social Media Post Templates	
☐	32	Social Media Banner Ads	
☐	33	Website Hero / Promotional Banners	
☐	34	Digital Display Ad Set	
☐	35	Product / Service Photography	
☐	36	Team / Company Photography	
☐	37	Testimonial / Review Graphics	

SALES & CUSTOMER-FACING

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	38	Case Study / Success Story	
☐	39	Customer Onboarding Packet	
☐	40	Customer Intake / Order Form	
☐	41	Sales Pipeline / CRM Tracker	

OPERATIONS & PROCESSES

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	42	Core Process Maps	
☐	43	Critical Standard Operating Procedures (SOPs)	
☐	44	Operations Checklists	
☐	45	Quality / Service Standards	
☐	46	Vendor & Supplier Register	

PEOPLE & HR

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	47	Job Descriptions / Role Scorecards	
☐	48	Employee Handbouk & Core HR Policies	

TECHNOLOGY, DATA & CONTINUITY

	#	DOCUMENT / VISUAL ASSET	PRIORITY
☐	49	Technology, Data & Access Register	
☐	50	Risk Register & Business Continuity Plan	



HOW TO USE THIS CHECKLIST

- ✓ Start with all “Essential” items – they form the foundation.
- ✓ Add “High” priority items next to support growth and efficiency.
- ✓ Add “Situational” items based on your industry, size, location, and operations.
- ✓ Review and update your documents regularly to keep them accurate and useful.



REMEMBER

The goal is to create the simplest, most useful system that helps you run your business better, serve your customers, and grow with confidence.