IT / INTERNAL OPERATIONS · TEMPLATE

Internal Systems Map & Process Checklist

A one-page map of which tool covers which internal function, who owns it, and what must be documented, where, and by whom.

How to use this: Fill in the systems map with your current (or intended) tools and owners, then work through the process checklist to confirm the minimum documentation and security habits are actually in place.

Systems Map

List the single source-of-truth tool for each function. If a function is covered by more than one tool right now, note that as a flag to resolve.

Function	Tool (source of truth)	Owner	Backup owner	Last reviewed
CRM / customer records				
Support / ticketing				
Documentation / internal wiki				
Analytics / usage data				
Access & security (passwords, permissions)				

Duplicate or Conflicting Systems

Note any function currently covered by more than one tool, spreadsheet, or inbox, and what needs to happen to consolidate it.

Function with overlapping systems:

Systems currently in use for it:

Which one becomes the single source of truth:

Who is responsible for the migration and by when:

What Must Be Documented, Where, and By Whom

Define the minimum set of things that must always be written down, not left to memory.

Type of information	Where it must live	Who writes it	When it gets written
Customer-specific commitments or exceptions			
Recurring support issues and their resolution			
Pricing or contract exceptions			
Internal process changes			
Access granted/revoked for any system			

Security Hygiene Checklist

- [ ] Every team member has a unique login for every tool — no shared accounts
- [ ] A password manager is in use for all shared or sensitive credentials
- [ ] Two-factor authentication is enabled on CRM, billing, email, and admin accounts
- [ ] A current list of who has access to what exists and is reviewed regularly
- [ ] Access is revoked the same day someone leaves or changes roles
- [ ] Customer data exports or backups are stored in a defined, limited-access location

Quarterly System Review

A short recurring check to prevent decay. Assign this to one owner and put it on a calendar.

- [ ] Confirm each system still has an active, correct owner
- [ ] Confirm no new duplicate or shadow systems have appeared

- [ ] Spot-check documentation for staleness on 2-3 recent processes
- [ ] Review the access list and remove anything no longer needed
- [ ] Note any function that has outgrown its current tool

Open Gaps to Address Next

Function with no clear owner right now:

Function with no documentation habit right now:

Single biggest security gap right now:

Next action and owner: