



**YOUR ROADMAP**

Starter Topics For Documentation

# Trainual

Over time, you document as you develop. Your experiences become memorialized into policies, processes and standard operating procedures. In the following pages, we've shared 150+ sample topics from our own playbook and thousands of Trainual customers to help you save time and proactively document what matters most in your organization.

## General Company Information

- Basic Company Info
- Company History
- Founding Story
- Mission, Vision & Values
- Team Bios & Stories
- Competitive Landscape
- Glossary of Industry Terms
- Company Equipment
- Logins & Passwords
- Software We Use
- Social Media Policy
- Time Tracking
- Flexible Work Hours
- PTO & Time Off Policies
- Sick Days
- Holiday Schedule
- Maternity & Paternity Leave
- Bereavement Policy
- Pay Periods For Employees
- Benefits Packages
- Business Travel
- Expense Reimbursement
- Scheduling Meetings
- Non-Compete Policy
- Non-Solicitation Policy
- Communication Protocols
- Office Locations
- Retreats & Gatherings
- Industry Overview
- Remote Work Policy

## Management

- Annual Planning
- Quarterly Planning
- Meeting Agendas
- Decision Making Hierarchy
- Purchasing Approval Levels
- Interview Process
- Competitor Evaluations
- Investor Relations
- Investor Pitch Deck
- Manager Reviews
- Communication Styles
- Complaint Process
- Customer Escalations

## Finance

- Invoicing Clients
- Account Reconciliation
- Collections Process
- Bank Deposits
- Handling Cash
- Drawing From Line of Credit
- Cash Flow Management
- Preparing Statements
- Progress Billing
- Budgeting
- Forecasting
- Long-Term Financing
- Credit Card Payments

## Human Resources

- New Hire Orientation
- Employee Onboarding
- Running Payroll
- Termination Process
- Recruiting Talent
- Disciplinary Action
- Performance Evaluations
- Adjusting Compensation
- Benefits Administration
- Office Safety
- Sexual Harassment
- Background Checks
- Company Culture

# Trainual

## Marketing & Sales

- Brand Guidelines
- Messaging Voice and Tone
- Social Media Channels
- Content Calendar
- Guest Post Guidelines
- The Company Blog
- Keyword Research
- Paid Ad Strategy
- Google Analytics
- Design Standards
- Promotional Materials
- Trade Shows & Events
- Customer Testimonials
- Client Personas
- Customer Relationships
- Outbound Sales
- Inbound Sales
- Client Visits
- Using Our CRM
- Phone & Email Scripts
- Sales Meetings
- Proposals
- Asking For Referrals
- Affiliate Program
- Sales Decks
- Podcast Publishing
- Webinars
- Follow-up Procedures
- Standardized Pricing
- Estimates
- Up-sells and Down-sells
- Incentives & Bonuses
- Purchasing Lists
- Direct Mail Campaigns
- Active Funnels
- Current Advertisements
- Archived Advertisements
- Discounts & Volume Pricing
- Video Editing

## Operations

- Ordering Supplies
- Inventory Management
- Picking & Fulfillment
- Drop-Shipping
- Packaging & Shipping
- Equipment Maintenance
- Quality Assurance
- Development Process
- Product Roadmap
- Refund Policies
- Product FAQ's
- Front Desk Policies
- Vendor Selection Process
- Email Management
- Ticketing System

## IT

- Software Maintenance
- Hardware Installations
- Data Management
- Learning Our Web Stack
- Accessing WiFi
- App Integrations
- Remote Access
- Device Troubleshooting
- Authorized Devices
- Installing From Image
- Help Desk Requests
- New Equipment Purchasing
- Printing
- Upgrade Schedule
- Firewall and Security

## Miscellaneous

- Opening Procedure
- Closing Procedure
- Receiving Deliveries
- Processing A Sale
- Trash & Recycling
- Sales Tax Filing
- Workers Compensation
- Pricing Overrides
- Billing Insurance
- Customer/Patient Notes
- Preferred Vendor List
- Case Studies
- Ordering Business Cards
- Work Samples
- Focus Groups