T

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

- [x] 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

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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