COMPANY DATA INVENTORY

Tell us about your company's data

This helps us understand what your business has built up over the years and what it could be worth. Rough answers are fine, and anything you're unsure about can be left blank.

EXAMPLE A fictional company with made-up data, filled in the way we'd love to see yours.

IN THIS FORM

01	Company information	page 1
02	Contact details	page 1
03	Operating profile	page 2
04	Licensing and language	page 2
05	Team size	page 2
06	Systems and tools	page 3

HOW TO FILL IT IN

1. **Click a shaded box and type.** Tab moves to the next box.
2. **Rough answers are fine.** Leave anything you're unsure about blank.
3. **Save the file when you're done.** Email it back to whoever sent it to you.

01 Company information

The basics about your business.

Company name: Cardinal Air & Plumbing, Inc. (fictional)

Website: https://www.example-cardinalair.com

Country: United States

Year founded YYYY: 2004

What the company does 1-2 sentences: what you sell, to whom, and roughly how big

Family-owned residential and light-commercial HVAC and plumbing contractor in central Ohio, still run by the two brothers who founded it. Three branches, 46 trucks, about 22,000 service calls and 900 system installs a year. We bought a competitor in 2019 and have never taken outside investment.

Industry group e.g. Operations & Industry: Operations & Industry

Industry e.g. Construction & trades: Construction & trades

02 Contact details

Who we should talk to about this inventory.

First name: Elena

Last name: Martinez

Email: elena.martinez@example-cardinalair.com

Phone: +1 (614) 555-0148

03 Operating profile

Where the business stands today. Estimates are fine.

Operating status Required

(•) Active ( ) Defunct ( ) Winding down

Years operating e.g. 12

22

Estimated annual revenue in US dollars, a rough number is fine

38,000,000

04 Licensing and language

Anything that affects whether your records can be shared, and what language they're in.

Licensing readiness pick the one closest to where you are

(•) Open to licensing or sharing company-owned business records, subject to confidentiality

( ) Need sign-off from a partner or co-owner first

( ) Not sure yet

Language of records e.g. English, Spanish

English

05 Team size

How many people work there today, and the most you've ever had at one time.

Type	Current	Peak	Notes e.g. peak during busy season
Full-time employees	118	132	74 field techs and 44 office staff, summer peak
Contractors	8	18	Seasonal specialist crews, mostly in summer

Before you start the systems table

WHERE YOUR DATA LIVES

- Accounting and invoicing
- Customer records (CRM)
- Support desk and tickets
- Scheduling and field service
- Email and documents
- Chat (Slack, Teams)
- Phone and call recordings
- Payroll and HR
- Payments and banking
- Industry software (CAD, POS, EHR)
- Marketing and website
- Old systems and paper archives

FINDING THE NUMBERS

Export size: look for Storage in the program's settings. No number? Download a copy and read its size, or write "couldn't find it" in Notes.

Years of data: from when you started using it to today, or to when you stopped.

Can it export? most programs let the main login download a copy. Not sure is a fine answer.

06 Systems and tools

The software your business runs on: accounting, CRM, support desk, scheduling, file storage, industry tools. Use one row per system and leave any extra rows empty. This is the most useful part of the inventory.

■ Dark titles are the ones we need most. ☐ Light ones are optional, but pick GB or TB with a size, and use Notes for anything that doesn't fit.

System e.g. QuickBooks	What you use it for a few words	Approx. export size a number	Units GB or TB	Years of data e.g. 8	Start date YYYY-MM	End date YYYY-MM	What's in it? kinds of records	Can it export? pick one	Export format e.g. CSV, API	Notes anything else
e.g. QuickBooks Online	Accounting	(blank)	(blank)	11	2016-01	(blank)	Invoices, bills, payroll	Yes	CSV, PDF	couldn't find it
ServiceTitan	Field service: jobs, dispatch, invoicing	6.2	TB	9.2	2017-09		Jobs, tech notes and photos, estimates won and declined	Yes	CSV, API	About 410,000 jobs
Wintac (retired)	Old field service system	40	GB	13.0	2004-01	2016-12	Job history, customers, dispatch logs, original equipment installs	Partial	SQL backup	On an old office server, no vendor support
Paper job tickets (scanned)	Old service records	900	GB	13.0	2004-01	2016-12	Handwritten technician notes, parts used, customer signatures	Partial	Scanned PDF	Scanned in 2019, OCR quality is mixed
QuickBooks (Desktop, then Online)	Accounting			22.9	2004-01		Invoices, purchase orders, supplier bills, payments, ledger, job costing	Yes	CSV	F2: 1,480,000 K. Online: couldn't find it
Bill.com	Accounts payable	8	GB	6.2	2020-09		Supplier invoices, approval chains, payment timing	Yes	API, CSV	Keep out: school district contract jobs
Chase Business + Amex	Banking and company cards	3	GB	22.9	2004-01		Statements, deposits, card spend by branch and technician	Yes	CSV, OFX	
HubSpot	CRM for commercial work			7.2	2019-09		Leads, contacts, deals, email sequences, won and lost reasons	Yes	API, CSV	couldn't find it
Stripe + Wisetack	Payments and customer financing	6	GB	8.2	2018-09		Card payments, refunds, financing approvals and declines	Yes	API	
ADP Workforce Now	HR and payroll	10	GB	15.2	2011-09		Pay plans, commissions, hours, reviews, turnover	Yes	XLSX reports	Employee personal data throughout
Google Workspace	Email, documents and file storage	2.4	TB	18.2	2008-09		Owner and manager email, pricing decisions, plans, shared files	Yes	ZIP	Customer personal data mixed in
Slack	Team chat			6.2	2020-09		Dispatch escalations, parts sourcing, questions from the field	Partial	JSON	couldn't find it
Asana	Projects and tasks	5	GB	5.2	2021-09		Install plans, branch opening checklists, stalled projects and why	Yes	API, CSV	

06 Systems and tools, continued

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RingCentral + CallRail	Phone system and call recording	7.5	TB	7.2	2019-09		Inbound service calls, booking outcomes, missed calls	Yes	MP3, transcripts	Voice data, needs a consent check
Zendesk	Support desk			6.2	2020-09		Complaints, warranty questions, billing disputes, credits issued	Yes	API	couldn't find it
Google Ads + Meta Ads	Advertising	4	GB	10.2	2016-09		Spend by channel and season, cost per booked job	Yes	API	
Mailchimp	Email marketing	2	GB	9.2	2017-09		Seasonal campaigns, renewal reminders, response by segment	Yes	API, CSV	
Podium	Reviews	3	GB	8.2	2018-09		Google and Facebook reviews, our replies, make-good offers	Yes	CSV	
WordPress + booking widget	Website and online booking	25	GB	11.2	2015-09		Booking funnel analytics, quote requests, chat transcripts	Yes	SQL dump, GA4	
Looker Studio + Excel models	Reporting	6	GB	7.2	2019-09		Branch P&L, technician productivity, close rates, budgets	Yes	Sheets, XLSX	
Verizon Connect	Fleet GPS	60	GB	8.2	2018-09		Routes, drive time against time on site, repeat trips, fuel	Yes	CSV	
Supplier portals	Parts and inventory	9	GB	9.2	2017-09		Parts catalog, truck stock, pricing tiers, backorders	Yes	CSV	Supplier pricing is under NDA
DocuSign	Contracts and e-signature	35	GB	9.2	2017-09		Install agreements, service contracts, change orders	Yes	API, PDF	
Manufacturer portals	Warranty claims	18	GB	12.2	2014-09		Equipment registrations, failure claims, claim denials	Partial	Portal download	Carrier, Rheem, Bradford White
County permit portals	Permits and inspections	45	GB	14.2	2012-09		Permit applications, inspection results, corrections	Yes	PDF	
Training and SOP library	Internal know-how	150	GB	10.2	2016-09		Diagnostic checklists, install standards, safety procedures	Yes	PDF, DOCX	Written by our senior technicians

06 Systems and tools, continued

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Ready to send? Save this file and email it back to whoever at DataNow sent it to you. Ran out of rows? Send a spreadsheet with the same columns along with it.