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.

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

Website

Country

Year founded YYYY

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

Industry group e.g. Operations & Industry

Industry e.g. Construction & trades

02 Contact details

Who we should talk to about this inventory.

First name

Last name

Email

Phone

03 Operating profile

Where the business stands today. Estimates are fine.

Operating status Required

◯ Active ◯ Defunct ◯ Winding down

Years operating e.g. 12

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

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

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			
Contractors			

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

06 Systems and tools, continued

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

06 Systems and tools, continued

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

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.