

# THE BUSINESS INFORMATION MAP

A practical map of where critical business information lives,  
who owns it, and who needs access.

CLEAR BOOKS. CALM OPERATIONS. CONFIDENT DECISIONS.

*Business Operations & Bookkeeping Support*



## If Important Information Lives Everywhere, It Is Hard to Trust Anywhere

Most small businesses do not have an information problem because they lack information. The problem is that important details are spread across inboxes, folders, software, notebooks, shared drives, individual devices, and people's memories.

This map helps you create a simple inventory of the information your business depends on: where it lives, who owns it, who can access it, and what would happen if the usual person were unavailable.

### What this is - and is not

This is an information-location map, not a place to record confidential credentials. Do not write passwords, recovery codes, bank account numbers, tax IDs, card numbers, or other sensitive data in this worksheet. Record only the approved system or secure location where access is managed.

### A useful information map should answer four questions

- ☐ What information does the business rely on?
- ☐ Where is the current source of truth?
- ☐ Who owns keeping it current?
- ☐ Who needs appropriate access or backup coverage?

Map the Information the Business Relies On

| Information category             | Primary system / location | Owner | Backup access | Current?                 |
|----------------------------------|---------------------------|-------|---------------|--------------------------|
| Customer / client records        |                           |       |               | <input type="checkbox"/> |
| Vendor records                   |                           |       |               | <input type="checkbox"/> |
| Contracts & agreements           |                           |       |               | <input type="checkbox"/> |
| Bookkeeping / accounting records |                           |       |               | <input type="checkbox"/> |
| Banking & finance records        |                           |       |               | <input type="checkbox"/> |
| Tax & compliance records         |                           |       |               | <input type="checkbox"/> |
| Insurance records                |                           |       |               | <input type="checkbox"/> |
| Employee / contractor records    |                           |       |               | <input type="checkbox"/> |
| Policies & SOPs                  |                           |       |               | <input type="checkbox"/> |
| Templates & standard documents   |                           |       |               | <input type="checkbox"/> |
| Projects & action tracking       |                           |       |               | <input type="checkbox"/> |
| Marketing / brand assets         |                           |       |               | <input type="checkbox"/> |

Information categories missing from this list:

# Choose the Source of Truth

When the same information exists in several places, decide which location is authoritative and which copies should be archived, linked, or retired.

| Information / document | Where it exists now | Source of truth | Cleanup needed |
|------------------------|---------------------|-----------------|----------------|
|                        |                     |                 |                |
|                        |                     |                 |                |
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|                        |                     |                 |                |
|                        |                     |                 |                |

## One source of truth does not mean one tool

Different information can live in different systems. The goal is not to force everything into one platform. The goal is that people know which location holds the current, dependable version.

## Map Access Without Recording Credentials

Identify who needs access, who can provide backup coverage, and where access is securely administered.

| System / information | Primary user | Backup user | Access managed in | Review needed?           |
|----------------------|--------------|-------------|-------------------|--------------------------|
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |
|                      |              |             |                   | <input type="checkbox"/> |

- ☐ Former employees/contractors have been removed where appropriate.
- ☐ At least one appropriate backup person can access business-critical systems.
- ☐ Account recovery is tied to current business-controlled contact information where practical.
- ☐ Access levels match what each person actually needs.

## Know Who Holds Important External Information

Some critical business knowledge sits with outside professionals and providers. Make the relationship easy to find without storing sensitive account details here.

| Role / provider            | Company / contact | What they support | Where records are kept |
|----------------------------|-------------------|-------------------|------------------------|
| CPA / tax professional     |                   |                   |                        |
| Bookkeeper                 |                   |                   |                        |
| Bank / lender              |                   |                   |                        |
| Insurance agent / broker   |                   |                   |                        |
| Payroll provider           |                   |                   |                        |
| Attorney                   |                   |                   |                        |
| IT / technology support    |                   |                   |                        |
| Website / domain / hosting |                   |                   |                        |
| Key software provider      |                   |                   |                        |
| Other critical provider    |                   |                   |                        |

## Test the Map for Business Continuity

Imagine the person who normally handles an area is unexpectedly unavailable for two weeks. Could the business still find what it needs and keep moving?

| Business-critical area          | Can someone else find it? | Can someone else act?    | Gap to fix |
|---------------------------------|---------------------------|--------------------------|------------|
| Customer / client information   | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Billing & collections           | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Payables / vendor information   | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Banking / cash visibility       | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Payroll / people administration | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Contracts / legal records       | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Insurance / compliance          | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Core operational processes      | <input type="checkbox"/>  | <input type="checkbox"/> |            |
| Website / digital presence      | <input type="checkbox"/>  | <input type="checkbox"/> |            |

### A continuity gap is useful information

If one person is the only route to an important record, system, or process, you have found a business dependency worth reducing. The fix may be backup access, clearer documentation, or a named second owner.

# Create a Simple Document Map

Use this page as a high-level directory for the folders or systems people most often need.

| What someone is looking for   | System / folder | Path / navigation note | Owner |
|-------------------------------|-----------------|------------------------|-------|
| Current customer/client files |                 |                        |       |
| Current contracts             |                 |                        |       |
| Vendor bills / receipts       |                 |                        |       |
| Monthly financial records     |                 |                        |       |
| Templates                     |                 |                        |       |
| Policies / SOPs               |                 |                        |       |
| Marketing assets              |                 |                        |       |
| Meeting / action notes        |                 |                        |       |
| Project files                 |                 |                        |       |
| Archived records              |                 |                        |       |

## Keep navigation notes safe

Use general folder paths or system names only. Do not include confidential links, authentication details, personal data, or security information in a version of this map that may be widely shared.

# Decide Who Keeps the Map Current

An information map only helps if it reflects how the business actually works.

| Area                        | Information owner | Review frequency | Next review |
|-----------------------------|-------------------|------------------|-------------|
| Financial information       |                   |                  |             |
| Customer/client information |                   |                  |             |
| Vendor information          |                   |                  |             |
| People / HR records         |                   |                  |             |
| Operational processes       |                   |                  |             |
| Contracts / compliance      |                   |                  |             |
| Digital systems / access    |                   |                  |             |
| Brand / marketing assets    |                   |                  |             |

Where the master Business Information Map will live:

Who is responsible for reviewing the map overall:

# Your 30-Day Information Reset

Choose the gaps that create the greatest operational risk or wasted time. Fix those first.

| Priority | Gap to fix | Action | Owner | Done                     |
|----------|------------|--------|-------|--------------------------|
| 1        |            |        |       | <input type="checkbox"/> |
| 2        |            |        |       | <input type="checkbox"/> |
| 3        |            |        |       | <input type="checkbox"/> |
| 4        |            |        |       | <input type="checkbox"/> |
| 5        |            |        |       | <input type="checkbox"/> |

The one information gap I want resolved first:

**Prioritize access and continuity**

Start with information that affects money, customers, legal/compliance obligations, or the business's ability to operate when a key person is unavailable.

Can Your Business Find What It Needs?

- ☐ Critical information categories have a known home.
- ☐ Current sources of truth are clear.
- ☐ Important information has a named owner.
- ☐ Appropriate backup access exists for business-critical systems.
- ☐ External provider/contact information is easy to find.
- ☐ Obsolete access is reviewed and removed where appropriate.
- ☐ Important processes are not dependent on one person's memory.
- ☐ The map has an owner and a review rhythm.
- ☐ Sensitive credentials are stored securely outside this worksheet.

The biggest information risk I discovered:

The biggest improvement I made:

## Good Information Management Makes the Business Less Fragile

A business information map is not about creating more administration. It is about making the information you already have easier to find, easier to trust, and less dependent on one person.

When people know where the current information lives, who owns it, and how appropriate access is managed, everyday work becomes calmer and unexpected absences become less disruptive.

### When support may help

Business Operations Support or Back Office Operations can help when shared information, records, access, documentation, recurring administration, and process ownership need a more dependable structure behind the scenes.

**SCHEDULE A DISCOVERY CALL**

## MKG Legacy Ledger

### Business Operations & Back Office Support

Clear Books. Calm Operations. Confident Decisions.

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