Business Foundation Checklist

A practical review of records, responsibilities and safeguards. This 14-item tool is separate from the online 21-item checklist.

Name / business name / completion date

Business type / stage (planning, starting, established) / contact email

Foundation and financial records

Select one response per item: Yes = supported by a current record; Attention = a gap; Unsure = check; N/A = does not apply.

	Yes	Attention	Unsure	N/A
Legal name, ownership and registration records are accurate.	○	○	○	○
Required licenses and permits are identified and current, if operating.	○	○	○	○
Business money and records are kept separate from personal activity.	○	○	○	○
Insurance needs and policy renewal dates have been reviewed.	○	○	○	○
Bookkeeping is current through the last completed month.	○	○	○	○
Bank and card records are reconciled through that month.	○	○	○	○
Revenue, expenses and owner payments have supporting records.	○	○	○	○
Applicable filing and payment deadlines are listed on a calendar.	○	○	○	○
A cash-reserve target and review date are documented.	○	○	○	○

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Finish the operational review, then select the most important gap. For a business not yet open, assess what is prepared and mark operating-only items N/A.

Operations

Select one response per item: Yes = supported by a current record; Attention = a gap; Unsure = check; N/A = does not apply.

	Yes	Attention	Unsure	N/A
Each essential task has a responsible person, including an owner-operator.	○	○	○	○
Repeated tasks have usable written steps.	○	○	○	○
Important contracts and records can be located when needed.	○	○	○	○
Customer inquiries and follow-ups have a tracking method.	○	○	○	○
Access is reviewed when people join, leave or change roles.	○	○	○	○

From gaps to action

Up to three gaps needing attention

Which gap has the greatest impact or nearest deadline, and why?

First action / responsible person / target date / help needed

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Use this page to turn the review into a practical request for help.

What would you like Quoti to help you understand or complete?

Most important deadline / reason it matters

Information still needed / who will obtain it / target date

Choose a useful next step

For help discussing your concerns, book a free 15-minute introduction. It establishes fit; detailed review, written plans and implementation are separately scoped and priced.

Talk with Quoti: quoticonsulting.com/book-consultation

A deeper Business Health Scan uses business answers and financial figures. The online 21-item Underneath the Business checklist is a separate concern-gathering tool.

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