

00 source inventory

Print or fill in.

Form 00: source inventory

Answered by: you, alone, before speaking to them again **Time:** 45 to 90 minutes **Fills:** the harvest list, plus
marketing/channels.md , marketing/reviews-and-reputation.md , operations/tools-and-systems.md

This is a scavenger hunt, not a questionnaire. Most of it you can answer from outside. Do that first, then confirm the rest with them.

Mark every line one of three ways: **exists**, **does not exist**, or **do not know yet**. Never leave one blank and never guess. "Does not exist" is a finding worth as much as a URL.

Business: {{BUSINESS_NAME}} · Researched by: _____ · Date: _____

Website

Finding
Does a website exist
Address
What it is built on
Roughly when it was last updated
Is it secure, does it load, does it work on a phone
Who can make changes
Where the domain is registered, and who controls it
Where it is hosted
Is analytics installed
Honest condition in one line

Maps and local listings

Finding
Google Business Profile exists
Claimed or unclaimed
Review count and average
Date of most recent review
Has anyone replied to any review
Photos, how many and how recent
Hours correct
Apple Maps, Bing Places
Name, address and phone consistent everywhere

Reviews beyond Google

Check the platforms that matter in this trade specifically, not just the general ones.

Platform	Exists	Count	Average	Last one

What do the negative reviews have in common:

Social accounts

Platform	Exists	Handle	Last post	Followers
Facebook				
Instagram				
LinkedIn				
YouTube				
TikTok				
Other				

Any account abandoned but still visible:

Directories, associations and registers

Trade associations, chambers, licensing registers, sector directories, marketplaces, co-ops.

Where	Listed	State of the listing

Systems they run on

Ask about these; you cannot see them from outside.

Finding
Scheduling or job management
Quoting and invoicing
Accounting
{{CUSTOMER_WORD}} records
Payments
Email platform
Phone and messaging
File storage
Anything industry specific
Email list, and roughly how big

For each, note who holds the login. Logins held by a former employee or a lapsed agency are common and nobody finds out at a good moment.

Documents they already have

	Exists	Where	Condition
Price list			
Written procedures			
Safety documentation			
Employee handbook			
Standard contract or terms			
Warranty terms			
Licences and certificates			
Insurance certificates			
Product or service catalogue			
Previous marketing material			
Brand or logo files, originals			

Images and video

	Finding
Photos of the work, how many and how good	
Photos of the team or premises	
Video of any kind	
Who owns the rights	
Where they are kept	

Data we could get access to

Available
Website analytics
Search console
Advertising accounts
{{CUSTOMER_WORD}} list export
Sales history
Enquiry records

Recordings

Finding
Was the first call recorded
Is it transcribed
Any other recorded calls or meetings
Do they record calls as a matter of course

The gap list

The most valuable output of this form. Everything that does not exist, is broken, abandoned, or controlled by the wrong person.

1. 2. 3. 4. 5.

What to ask for

Specific things to request, and who to request each from.

1. 2. 3. 4. 5.