BU MANAGEMENT CHECKLIST

6 records to review before scaling

Practical template - not an assessment or certification by GTB.

BU / Company: _____

Reviewed by: _____ Review date: _____

For each item, record: Ready / Missing / Review; owner; and due date.

1. BU profile - Who is responsible for which activity?

Status: _____ Owner: _____ Due date:

Evidence / Next action: _____

2. Responsibility and approval matrix - What requires prior approval?

Status: _____ Owner: _____ Due date:

Evidence / Next action: _____

3. Cash and outstanding balances report - Can each figure be traced to evidence?

Status: _____ Owner: _____ Due date:

Evidence / Next action: _____

4. Contract and document register - Is the team using the correct version?

Status: _____ Owner: _____ Due date:

Evidence / Next action: _____

5. Task and deadline calendar - What is due soon or overdue?

Status: _____ Owner: _____ Due date:

Evidence / Next action: _____

6. Issue and decision log - Was the issue resolved or merely reported?

Status: _____ Owner: _____ Due date:

Evidence / Next action: _____

Your next three priorities

Priority / Owner / Due date

1. _____
2. _____
3. _____

Do not include passwords or sensitive personal data.