

Business startup checklist

Write a business plan

- ☐ Executive summary
- ☐ Business description
- ☐ Market research & competitor analysis
- ☐ Financial projections
- ☐ Company structure & operating plan
- ☐ Goals, objectives, & KPIs

Estimate startup costs

- ☐ Create a startup budget
 - ☐ One-time startup costs
 - ☐ Overhead costs (office rent, utilities, etc.)
 - ☐ Labor costs
- ☐ Create a dedicated startup savings account
- ☐ Research available grants, startup services, & other resources

Register your business

- ☐ Choose a structure (sole proprietorship, LLC, S-Corp, or C-Corp)
- ☐ Choose a business name
 - ☐ Claim a domain name
 - ☐ Claim relevant social media handles
- ☐ Register your business
 - ☐ Check state & local registration requirements
 - ☐ Register trademarks

Open accounts & obtain permits

- ☐ Open a company bank account
- ☐ Obtain an Employer Identification Number
- ☐ Get licenses & permits
 - ☐ Check local business licensing requirements
 - ☐ Obtain industry-specific permits (e.g. building permits, OSHA certifications, etc.)
 - ☐ Obtain a Sales Tax Permit, if necessary

Create a financial accounting system

- ☐ Hire a bookkeeper/accountant

OR

- ☐ Set up essential bookkeeping documents
 - ☐ Income statement
 - ☐ Balance sheet
 - ☐ Cash flow statement
 - ☐ Bills & invoices
 - ☐ Expense tracking
- ☐ Purchase accounting software (optional)
- ☐ Estimate your tax liability

Create a management system

- ☐ Create an organizational chart
 - ☐ Purchase project management software
- OR
- ☐ Set up essential management tools
 - ☐ Calendar & scheduling system
 - ☐ Budget tracker
 - ☐ Team management system
 - ☐ Short- & long-term goals and timelines
 - ☐ Choose & track KPIs

Launch branding & marketing

- ☐ Determine brand guidelines
 - ☐ Design or commission a logo
 - ☐ Select a color palette
- ☐ Create a website
 - ☐ About Us page
 - ☐ Contact information
 - ☐ Site menu/navigation bar
 - ☐ Core services & pricing
 - ☐ Online ordering
 - ☐ Customer testimonials
 - ☐ Company blog
- ☐ Set up relevant social media accounts
- ☐ Print business cards