



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 cost

- ☐ Create a startup budget
 - ☐ One-time startup costs
 - ☐ Overhead cost (office rent, utili, etc.)
 - ☐ Labor costs
- ☐ Create a dedicated startup saving 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 #
- ☐ 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
- ☐ 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
- ☐ 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
 - ☐ 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
- ☐ Setup relevant social media accounts
- ☐ Print business cards