



We created a long-term vision as well as an initial start-up checklist before launching on a full scale to assure we knew where we were going, and how we'd get off the ground. Create your own start-up task list and take time to make sure you cover everything relevant to your launch. Be as specific as possible.

Task	Notes
1) IDEA	
Evaluate your Idea	
2) PLAN	
Part-Time vs. Full-Time (Nick)	Business Incubators Option as Startup Option. ExtremeEntrepreneurship.com for Startup Tools
Buying a Franchise Info	Check UFDD's, Ask questions. Apply to other companies franchises. Franchise.org for information.
Defining Your Market	Identifying your niche. Consider subcontracting opportunities (government, university).
Market Research	Homework tasks such as surveys, competition, primary research, secondary statistics. Focus groups.

Name Issues	Trademark issues, logos, etc. USPTO.gov (No shading needed)
Business Structure	Choosing between a LLC, Corporation, S Corporation, Limited Partnership, etc. Fill out appropriate PAPERWORK. Consider city/ state regulations. Consult lawyer/ accountant. Incorporate.com and Legalzoom.com
Revise Business Plan	Revise- especially financial statements. Must create monthly projections for 3 years. Business plan templates at www.EffortlessEntrepreneur.com
Business Licenses and Permits	Investigate zoning, city, county, and state ordinances.
Hiring a Lawyer and Accountant	Shop around; Be prepared with business plan and questions. Don't overspend!

3) MONEY

Financing with friends and relatives	Startup costs worksheets.
How to Acquire Investors	Create business plan and get feedback from investor groups on feasibility and investment options. Angel investors vs Private Equity vs Friends and Family.
Debt Financing	Loan Applications, bank and loan options,
Govt. Loans	SBA, minority option?

4) SETTING THE STAGE

Choosing a Location	Location, issues to consider: parking, accessibility, office, shared space, incubators, facility worksheet, leases, lease checklist.
Working from Home Option	Zoning and legality issues. Know when to move.
Professional Image	Visit competitors site, logo- color, graphics, image, business cards, stationary, sign, decals. Vistaprint.com, Logoworks.com, 99Designs.com.
Inventory	Finding and dealing with suppliers, tradeshow, etc.
Offering Credit to Customers	Accepting credit cards, checks, ATM, collecting, merchant status - get referrals
Mailing and Shipping	Mailing equipment and accounts.
Hiring Employees	Consider various positions and alternatives: salary, hourly, part time, leased, temp, Craigslist.com
Employee Benefits Plan	Consider various options, follow mandatory laws.
Business Insurance	Cover basics, consider additional options, shop around.

5) GETTING STUFF

Equipment Basics	Cover necessities, shop around, consider leasing/ buy options.
Computer System	Consider necessities, consider additions: printer, scanner, extra comp, etc. Dell and BestBuy
Wireless Options	Consider wireless options- laptops, compatibility of equipment, etc.
Phones, Fax, Copiers	Consider Options- including Kinko's for starters,

	1800 #, etc. TollFreeNumbers.com
Lease or Buy a Car	Consider pros and cons of both alternatives... Be sure to test before anything.

6) MARKETING

Advertising	Consider all options- print, media, mail, brochures, etc. Consider costs and benefits. Calculate Return on Investment
Promotion	Get publicity, targets, releases, network,
How to Sell	This is for contracting business- product, price, placement, promotion... Find similar services customer base etc. Make appointments, guarantee.
Customer Service	Set standard and manual. How maintain customer loyalty?

7) USING THE INTERNET

Using the Net for Success	Links for: market research, competition, financing, legal/ business forms, taxes, banking, trade associations
Company Website	Create a SCRIPT. Shop around for best designer, host, etc.; be able to update it. Find similar 'model' sites. Odesk.com, elance.com, intuit.com, hostmysite.com
Internet for Advertising	Search engines, paid searches, affiliates, joint ventures, Search Engine Marketing, Search Engine Optimization. YODLE.com to manage search

engine marketing.

8) BOOKKEEPING

Basics of Accounting	Computer program, cash or accrual? General ledger, payroll, consult accountant. Quickbooks Online.
How to Create Financial Statements	Understand and be able to create statements and projections.
Managing Finances	Gross profit margin, breakeven, markup, budget, working capital. Chart of accounts.
What to Know about Taxes	Consider all issues, consult IRS publications, consult accountant.
Finishing Notes	"Success is a reward for hard work" "Setbacks are good teachers" "Failure is not an option"
Business Resources	Be sure to consult resources listed throughout book in addition to those listed here.

9) ADDITIONAL SPECIFIC

TASKS for YOUR BUSINESS
