

## ① PLAN IT

### Set clear goals

- Why are you doing this?
- How will you measure success?
- What do you value most?
- Be specific if you can.

### Start with the basics

- How do businesses work?
- What is your business model?
- [Business Model Basics](#)
- [Business Model Worksheet](#)

### Understand your market

- How big is it?
- Where is everyone?
- Who or what is the competition?
- [Find your NAICS Code](#)

### Spend time with customers

- What matters to them most?
- What pain do you remove?
- Remember, your job is to listen.

### Understand your value

- What do people buy from you?
- Why do they buy from you?
- What is most unique about you?
- Test your ideas with customers.

### → [Finance Basics](#)

- Understand the basics first.
- Make informed projections.

### → [Financing a Business Basics](#)

- How much do you need to start?
- Know your options for funding.
- Most equity is sweat equity.

## ② SET IT UP

### → [Name the business \(coming soon\)](#)

- Company name
- Product names
- Check trademarks
- Register trademarks

### Pick your legal structure

- Know your options
- [Business Structure Basics](#)
- [Legal Services Buyers' Guide](#)

### Make it official

- Register the business
- License the business
- Obtain EIN

### → [Express yourself: Brand 101 \(coming soon\)](#)

- Design/visual Identity: including logo, colors, wordmark, etc.
- Personality
- Message and story

### Establish place of business

- Define your needs and budget
- Contracts and leases
- Mailing address

### Financial housekeeping

- Separate personal and business
- Open a bank account
- Get credit cards

### Set up your tech

- Collaboration and project management
- Secure your data
- Password management
- Inventory management
- Customer database
- Scheduling and calendar

### → [Partnership Basics](#)

- Make a partnership agreement
- Channel partners
- Suppliers

## ③ LAUNCH IT

### Recognize yourself

Launching a new business is a milestone. It can also be very stressful. Time to give yourself a little credit—and maybe a treat.

### Communications

- Register a URL
- Set up business email
- Put up website (keep it simple)
- Optimize for search engines (SEO)
- Register with local search
- Establish social media
- Get a phone number
- Get some business cards

### Find customers

- Marketing plan
  - What's your goal?
  - Awareness, trial, purchase
  - What's your budget?
  - Who's your customer?
  - Where's your customer?
- Paid search marketing
- Social media marketing
- Networking and events

### Getting paid

- Invoicing and payment terms
- Accepting credit cards
- Point of sale

### Keeping the books

- [Accounting Software Buyers' Guide](#)
- [Hire Accountants and Bookkeepers](#)

### Is the price right?

- Are you charging the right price?
- Charging too little is worse than too much.

→ [Make an Action Plan](#)



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