

Copyable Beginner Business Startup Checklist

Use this checklist as a basic starting framework.

Business Idea

- ☐ Define the customer I want to serve
- ☐ Define the problem I solve
- ☐ Identify my first product or service
- ☐ Research competing businesses
- ☐ Talk with potential customers
- ☐ Confirm that customers appear willing to pay

Business Setup

- ☐ Choose a business name
- ☐ Check name availability
- ☐ Decide on a business structure
- ☐ Register or form the business if required
- ☐ Prepare applicable ownership/governance documents
- ☐ Obtain an EIN if needed
- ☐ Complete applicable state/local tax registrations

Compliance

- ☐ Research federal requirements
- ☐ Research state requirements
- ☐ Research county and city requirements
- ☐ Obtain required licenses and permits
- ☐ Check zoning requirements
- ☐ Determine appropriate insurance coverage
- ☐ Identify important filing and renewal deadlines

Money

- ☐ Open a business bank account
- ☐ Estimate startup expenses
- ☐ Estimate monthly operating expenses
- ☐ Set initial pricing
- ☐ Determine how much revenue I need each month
- ☐ Set up basic bookkeeping
- ☐ Create a simple cash-flow plan

Brand and Operations

- ☐ Establish basic branding
- ☐ Create a professional business email
- ☐ Create a simple website or landing page
- ☐ Set up payment processing
- ☐ Set up scheduling/invoicing if needed
- ☐ Create essential customer agreements or policies

Getting Customers

- ☐ Define my ideal first customer
- ☐ Choose my first 1–2 marketing channels
- ☐ Create a simple sales message
- ☐ Build a list of potential customers
- ☐ Start outreach
- ☐ Ask satisfied customers for referrals and reviews
- ☐ Track leads, sales, and results