



## **Equestrian Business Startup Checklist** (Australia & New Zealand)

*For coaches, riding instructors, hoof trimmers, equine bodyworkers, transporters, photographers, saddle fitters, clipper services, therapists, trainers and other equine service providers.*

Starting your own equine business can be incredibly rewarding—but success requires more than just horse knowledge and great service.

This checklist has been designed to help aspiring and new equine business owners establish strong business foundations before taking on their first clients.

Covering practical, legal, financial, safety, and operational considerations, this guide is suitable for a wide range of equine service providers across Australia and New Zealand.

Whether you're launching your first equine business or formalising an existing one, this practical checklist will help you establish strong foundations, reduce risk and present a professional business from day one.

<https://stabledocs.etsy.com>

[www.stabledocs.com.au](http://www.stabledocs.com.au)

# BEFORE YOUR FIRST CLIENT

*"Get your business foundations right"*

## 1. Business Setup

- ☐ Chosen a business name
- ☐ Registered ABN (Australia) or NZBN (New Zealand)
- ☐ Decided on sole trader vs company structure
- ☐ Separate business bank account established
- ☐ Business email address set up

## 2. Licences & Qualifications

- ☐ Relevant qualifications completed
- ☐ Industry certifications current
- ☐ First Aid certificate current
- ☐ Any local council requirements checked
- ☐ Copies of qualifications saved and accessible

## 3. Insurance

- ☐ Public Liability Insurance obtained
- ☐ Professional Indemnity Insurance considered
- ☐ Personal Accident / Income Protection considered
- ☐ Vehicle insurance suitable for business use (if applicable)
- ☐ Insurance certificates filed

## 4. Legal Protection

- ☐ Client Terms & Conditions prepared
- ☐ Service Disclaimer prepared
- ☐ Waiver / Liability Release available (where appropriate)
- ☐ Privacy Policy in place
- ☐ Cancellation policy established

## 5. Pricing & Services

- ☐ Clear service list created
- ☐ Pricing determined
- ☐ Travel fees decided
- ☐ Payment terms established
- ☐ Late payment process determined

## 6. Record Keeping

- ☐ Client record system established
- ☐ Booking system selected
- ☐ Invoice template created

- ☐ Receipt process established
- ☐ Backup system for records

## **7. Safety Planning**

- ☐ Risk assessment completed for services offered
  - ☐ Emergency contact procedure in place
  - ☐ Incident reporting process established
  - ☐ Personal safety procedures established ☐ Biosecurity considerations understood
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# **READY TO TAKE CLIENTS**

## **8. Marketing Basics**

- ☐ Facebook Business Page created
- ☐ Instagram Business Account created
- ☐ Google Business Profile established
- ☐ Business logo and branding organised
- ☐ Professional photos available

## **9. Client Experience**

- ☐ New client welcome information prepared
- ☐ Booking confirmation templates ready
- ☐ Reminder messages prepared
- ☐ Follow-up process established
- ☐ Testimonial request process created

## **10. Financial Management**

- ☐ Accounting software selected
  - ☐ Tax obligations understood
  - ☐ GST registration requirements reviewed
  - ☐ Business expenses tracking system set up
  - ☐ Budget created
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# **ONCE YOU'RE UP AND RUNNING**

## **11. Growth & Compliance**

- ☐ Review pricing annually
- ☐ Review insurance annually
- ☐ Renew qualifications/certifications
- ☐ Maintain client records securely

- ☐ Review business policies annually

## **12. Professional Development**

- ☐ Annual education budget set
- ☐ Industry memberships considered
- ☐ Attend clinics/workshops regularly
- ☐ Network with local professionals
- ☐ Stay current with industry best practice

## **13. Reputation Management**

- ☐ Collect testimonials regularly
- ☐ Monitor online reviews
- ☐ Maintain professional social media presence
- ☐ Address client concerns promptly
- ☐ Keep portfolio and examples current

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# **Service-Specific Section**

## **Additional Requirements May Apply If You Offer:**

### **Equine Coaching / Instruction**

- ☐ Rider emergency procedures established
- ☐ Helmet requirements communicated
- ☐ Rider waivers completed
- ☐ Lesson cancellation policy established

### **Hoof Trimming / Farriery**

- ☐ Horse handling safety protocols established

- ☐ Equipment maintenance schedule created
- ☐ PPE available and used

## **Equine Bodywork / Therapy**

- ☐ Scope of practice clearly defined
- ☐ Veterinary referral process understood
- ☐ Client consent forms prepared
- ☐ Treatment records maintained

## **Horse Transport**

- ☐ Appropriate vehicle licences held
- ☐ Transport insurance reviewed
- ☐ Emergency roadside plan established
- ☐ Horse transport documentation process established

## **Trainers / Educators**

- ☐ Horse handling protocols documented
- ☐ Training expectations communicated
- ☐ Progress reporting process established

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## **Are You Really Ready For Your First Client?**

- ☐ I can clearly explain what service I offer
- ☐ I know exactly what I charge
- ☐ I have business insurance in place
- ☐ I have a way to book clients
- ☐ I can issue an invoice or receipt
- ☐ I have written terms and conditions
- ☐ I know what I would do if something went wrong
- ☐ I feel confident delivering my service professionally

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