

Business Foundations

- Define your business purpose, mission, and target market
- Choose the optimal business structure (LLC, S-Corp, etc.)
- Register your business with the appropriate state agencies
- Obtain an Employer Identification Number (EIN)
- Set up a business bank account and payment processing systems

Legal & Compliance Essentials

- Check required licenses, permits, zoning, and registrations
- Secure necessary industry-specific permits
- Draft or customize your Operating Agreement (if applicable)
- Ensure written contracts for vendors, partners, or clients
- Establish clear ownership and leadership roles

Organizational Systems & Operations

- Develop a file organization system (digital and physical)
- Create Standard Operating Procedures (SOPs) for core functions
- Implement workflow tools (e.g., Trello, Google Workspace)
- Define onboarding processes for staff or contractors
- Set up internal documentation and version control

Finance & Accounting Setup

- Choose accounting software and chart of accounts
- Establish bookkeeping routines (invoicing, expenses, payroll)
- Create financial reporting templates (profit & loss, balance sheet)
- Set up business taxes and payment schedules for compliance
- Identify a process for financial reconciliations and audits

Marketing & Brand Presence

- Select a business name and domain
- Create core branding assets (logo, business card, website)
- Set up business email and social profiles
- Develop initial marketing plans or launch campaigns
- Integrate analytics to track customer engagement

This checklist helps new entrepreneurs and agency owners establish the core elements of a business launch – from legal structure to operational readiness and brand presence.