



Business Checklist for Start-Ups

- ❑ **Create Your Business Plan**
 - *The more detail, the better. You will need this for lenders, investors and associations as you are just starting out - since you won't yet have financial records to show. [CLICK HERE](#) for step by step advice on creating your business plan.*
- ❑ **Come Up With A Business Name**
 - *It is a good idea to [CHECK NUANS](#) to see if your chosen name is available, and also do a quick Google search to ensure that a possible web domain and social media tags are available as well. This will be critical for when you apply for a trademark later on.*
- ❑ **Establish Your Business Address**
 - *This could mean you need to buy, rent or lease your office space. If you are setting up to work remotely without a brick and mortar office, consider signing up for a mail receiving service at a coworking space like WeWork or Dymon to protect your personal address and identity. You will need this address when registering your business and online presence.*
- ❑ **Incorporate / Register with the CRA**
 - *Discuss with your lawyer and accountant the best setup for your company - Ltd., Inc., sole proprietor, etc. To incorporate federally, [CLICK HERE](#).*
- ❑ **Open A Business Bank Account/Credit Card**
 - *You'll want to start using a business bank account as you start incurring start-up costs. Your home bank is a good place to start, but be sure to ask around and ensure that your chosen financial institution can support your needs - your business plan should dictate how much of a line of credit you need, and be sure to get a corporate credit card as well.*
- ❑ **Select a Lawyer**
 - *Lean on referrals and research as much as you can. Meet with and interview potential lawyers before making a decision. You'll want one that matches your size, understands your needs and values, and fits your budget. The wrong lawyer can end up costing you more time and money than you'll save by having representation.*
- ❑ **Set Up Your Accounting System**
 - *There are many free solutions available that you can take advantage of as you work on developing your overall infrastructure. Quickbooks, Wave and Simply Accounting are good options - remember to keep all your receipts!*
- ❑ **Register A Domain**
 - *Use a domain management service like GoDaddy or Hover to purchase your domain name. You don't need to pop up a website immediately, but you'll want to reserve the domain*
- ❑ **Set Up Your CRM**
 - *There are many free solutions you can use to manage your sales funnel and to organize and communicate with your Clients, Prospects and Suppliers. Salesforce, HubSpot and Streak are all great options depending on your needs.*
- ❑ **Select an Email service provider**
 - *Now that you have a domain name, you will want a business email address. Choose a provider such as GSuite (our favourite) or Outlook and get your business account set up. In addition to your own personal address, it is a good idea to create one that your future team can use to respond to inquiries, such as info@yourdomain.ca*
- ❑ **Acquire a Business Phone Number**
 - *You may want to set up a second phone, or at least a second SIM card for business purposes, rather than using your personal number. Or, you may simply want a public-facing or toll-free number that forwards to your personal phone to protect your privacy. [OpenPhone](#) can help with this in a cost-effective way, so that*

you don't need to set up additional phone lines but also don't need to share your personal information with the world.

❑ **Register Social Media Profiles**

- Use your newly purchased domain to reserve your Instagram and Twitter handles, your LinkedIn Company page, your Facebook Business page and address and your Google My Business entry. There are other platforms you can look into as you grow, but having these ones set up and reserved early is important!

❑ **Determine Your Brand Identity**

- You'll want to get crystal clear about your brand - WHY you are in business, WHAT business you are in and what is the benefit you bring to the marketplace. It is critical to nail this down early, before investing in marketing that you'll need to change and update, and so that you can offer clear messaging to your stakeholders right from the start. Companies like [Candybox Marketing](#) and [Vivian Kaye](#) can assist with exercises that will help you.

❑ **Set Up A Website**

- You don't need to stress about a big, fancy platform right from the start - just ensure there is a landing page for people to find as they start to search for you, and a couple key highlights to start building your organic SEO. A simple About Us page and contact page should be enough until you have the time and resources to build out details on all your products and services.

❑ **Start Your Revenue Stream (Contracts/Service Agreements)**

- As early orders start rolling in, you'll want to ensure that you are set up to accept them! Draft up a templated Contract, Purchase Order or Service Agreement that you can use for your Clients, so that as business grows, you have a process you can easily follow. Sites like [THIS ONE](#) can help with including some of the legal clauses you need without paying a lawyer right away.

❑ **Create A Logo**

- You'll need this for your website, social media, email signature and business cards! If you aren't the artistic type, try websites like Fiver or Freelancer where you can have a freelancer designer create a logo for you that fits your budget.

❑ **Create And Order Business Cards**

- Eventually you'll have flyers and swag and all sorts of marketing materials to help you along. For now, you'll be all set with a good old business card. Let's put that logo to work!

❑ **Certify Yourself As A Diverse Supplier**

- Does your business qualify to certify with WBE Canada (Woman-owned business), CAMSC (Canadian Aboriginal & Minority Supplier Council), CGLCC (Canada's LGBT+ Chamber of Commerce), IWSCC (The Inclusive Work and Supply Council of Canada, certifier of Veteran and/or disabled owned businesses) or the CCAB (Canadian Council for Aboriginal Business)? Make sure to get your application started to access unique procurement opportunities and network with mentors and peers!

❑ **Consult Your Insurance Agent And Secure Coverage**

- Make sure you are covered with liability and cybersecurity insurance, as well as any other type of coverage your industry might require! In addition to this - you'll want to register your company with your province's workplace safety insurance board; WCB, CNESST or WSIB.

❑ **File For Trademarks And Patents**

- Speak with your lawyer about starting this process - which can take a long time! You may want to trademark your name, logo and/or slogan. If you have a unique product you will want to look into a patent as well.

❑ **Work Your Network**

- Now that you have some of the basic tools and processes in place, compile a list of your personal and professional contacts across all platforms. Check your personal email, your mobile device, your LinkedIn profile, your address book, and anywhere else you can think of! Load these into your CRM, along with any other sales leads you've picked up along the way, and send out an announcement that you are open for business!

Staff Shop is pleased to provide consulting services and to facilitate the steps in this process, as well as assisting with establishing brand language, internal processes, hiring your team and placing the right talent in the right roles. Please get in touch with us at info@staffshop.ca - you are not alone and we are here to help you with this exciting journey!