

STAGE 1 / PLAN YOUR FOUNDATIONS

Small Business Startup Checklist

A practical checklist to move from business idea to launch, one informed decision at a time.

Business name: _____ Target launch: _____

01 Business idea and research

- ☐ Define the problem your business solves
- ☐ Identify your target customer
- ☐ Research your market
- ☐ Research competitors
- ☐ Define your point of difference
- ☐ Test whether customers will pay for your offer

02 Business planning

- ☐ Clarify your business model
- ☐ Write a simple business plan
- ☐ Set initial goals
- ☐ Estimate startup costs
- ☐ Create a basic budget
- ☐ Work out how the business will make money

03 Business setup

- ☐ Choose a business name
- ☐ Check name availability
- ☐ Choose your business structure
- ☐ Complete required registrations
- ☐ Check licences and permits
- ☐ Register relevant domain names
- ☐ Create a professional business email

STAGE 2 / PREPARE TO TRADE

Money, pricing and protection

Work through the financial and risk requirements that apply to your business before trading.

04 Finance

- ☐ Open an appropriate business bank account
- ☐ Set up bookkeeping
- ☐ Understand your tax obligations
- ☐ Create an invoicing process
- ☐ Establish payment methods
- ☐ Create a cash-flow forecast
- ☐ Keep business and personal transactions separate

05 Legal and risk

- ☐ Check insurance requirements
- ☐ Prepare contracts or terms where appropriate
- ☐ Create website legal policies where required
- ☐ Understand privacy obligations
- ☐ Protect important intellectual property

06 Products, services and pricing

- ☐ Define your core offer
- ☐ Calculate your costs
- ☐ Set your prices
- ☐ Define payment terms
- ☐ Test your product or service
- ☐ Establish refund, cancellation or return processes

Notes / next action

STAGE 3 / GET READY FOR CUSTOMERS

Marketing, operations and launch

Build a simple way for customers to find you, buy from you and receive what you promised.

07 Marketing and sales

- ☐ Create your basic brand identity
- ☐ Build your website or landing page
- ☐ Set up relevant business profiles
- ☐ Develop a simple marketing plan
- ☐ Create a sales process
- ☐ Prepare your launch strategy
- ☐ Start building an email list

08 Operations

- ☐ Document important processes
- ☐ Choose essential software
- ☐ Set up file storage and backups
- ☐ Create customer service procedures
- ☐ Establish supplier relationships where necessary
- ☐ Track important business metrics

09 Launch

- ☐ Test the customer journey
- ☐ Check your website and payment systems
- ☐ Ask someone else to test everything
- ☐ Announce your business
- ☐ Start selling
- ☐ Ask early customers for feedback
- ☐ Review and improve

STAGE 4 / LEARN AND IMPROVE

Your first 30 days

Use your first month to understand what customers need and what your business needs next.

10 Review after launch

- ☐ Track where your customers come from
- ☐ Record questions customers repeatedly ask
- ☐ Identify products or services generating interest
- ☐ Note objections preventing sales
- ☐ Review website traffic and conversion rates
- ☐ Collect customer feedback
- ☐ Review cash flow and unexpected costs
- ☐ Identify time-consuming activities
- ☐ Choose one improvement based on what you have learned
- ☐ Set your next review date

My three next priorities

1. _____
2. _____
3. _____

How to use this checklist

Tick each item when complete. If an item does not apply, mark it N/A. Work in stages: some tasks must be completed before trading; others can develop during your first month or as you grow.

Check your local requirements

This checklist is general guidance. Registration, tax, licensing, insurance and legal requirements vary by country, state, industry and business structure. Confirm the requirements that apply to you with the relevant authorities or a qualified adviser before trading.