



# New Organizing Business Checklist

## Getting Started

- Research the Professional Organizing Industry
- Read organizing books and organizing blogs
- Research business advice websites (vistage.com, sba.gov, eonetwork.org)
- Join a networking organization (chamber of commerce, napo.net, etc.)
- Find a mentor, coach, or business consultant
- Develop a niche or area of expertise
- Name your business and develop tagline
- Buy domain (godaddy.com)
- Check with Secretary of State for name availability and file for DBA

## Legal

- Write business plan
- Decide entity (Sub-S Corp, LLC, etc.)
- Register business name with Secretary of State and other local agencies
- Research tax requirements for your state and register with Dept of Revenue
- Purchase business insurance (Liability, Umbrella, Errors & Omissions)

## Banking

- Complete federal SS-4 form and obtain an EIN number

- Open business bank account and purchase checks & deposit slips
- Get a business debit card and/or credit card
- Set up a merchant account to accept credit cards or a service like PayPal

## Logistics

- Set up your desk and office space
- Set up a phone number and voicemail message
- Purchase a computer, and business equipment (scanner, printer, headset)
- Create an email signature line that includes area code and phone number
- Purchase a backup system for your computer (Carbonite, Mozy, etc.)

## Doing Business

- Estimate your business costs & develop a budget
- Define how you price your services and your rates (hourly, packages)
- Establish billing policies
- Develop services agreement and subcontractor agreement
- Purchase and set-up accounting software or create invoicing system
- Decide if you want to hire a bookkeeper or accountant



# New Organizing Business Checklist

## Marketing and Branding

- Purchase a domain name or a few domain names including your own name
- Set up website hosting
- Set up email
- Create a logo
- Get at least one professional headshot
- Write a professional bio
- Create business cards
- Create stationary (letterhead, notecards, envelopes, address labels)
- Create a website yourself or hire a designer.
- Create social media profiles (Facebook, Twitter, LinkedIn, etc.)
- Get the word out that you are open for business

## Client Experience

- New client questionnaire ("intake forms" or "assessment forms")
- Consultation process: expectations, billing, services, etc.
- Welcome letter or booking confirmation
- Feedback form, testimonial, online reviews (Google, Yelp)