



# Beginner Business Startup Checklist

A simple step-by-step checklist to help you prepare, organize, and move forward with confidence

Business requirements vary by location and industry. Use this checklist as an organizing guide, then confirm official requirements with the appropriate federal, state, and local agencies.

## 1. Clarify the idea

|                                                                            |                                                                                  |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <input type="checkbox"/> I can clearly explain what I plan to sell         | <input type="checkbox"/> I know what problem or need my offer addresses          |
| <input type="checkbox"/> I have identified the customer most likely to buy | <input type="checkbox"/> I have compared products, services, and digital options |

## 2. Research before spending

|                                                                                         |                                                                                       |
|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> I searched for similar offers and competitors                  | <input type="checkbox"/> I reviewed customer comments and complaints                  |
| <input type="checkbox"/> I identified signs that people are actively buying             | <input type="checkbox"/> I found at least one way my offer can be different or better |
| <input type="checkbox"/> I tested or planned a small test before buying large inventory |                                                                                       |

## 3. Understand the money

|                                                                                      |                                                                           |
|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| <input type="checkbox"/> I estimated one-time startup costs                          | <input type="checkbox"/> I estimated ongoing monthly expenses             |
| <input type="checkbox"/> I calculated materials, labor, fees, shipping, and overhead | <input type="checkbox"/> I created a realistic starting budget            |
| <input type="checkbox"/> I decided what I need to save before launching              | <input type="checkbox"/> I checked whether the price can support a profit |

## 4. Prepare the business foundation

|                                                                                               |                                                                                     |
|-----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <input type="checkbox"/> I researched business-name availability                              | <input type="checkbox"/> I reviewed possible business structures                    |
| <input type="checkbox"/> I checked registration, permit, license, zoning, and insurance needs | <input type="checkbox"/> I researched EIN and tax responsibilities                  |
| <input type="checkbox"/> I planned how business and personal money will be separated          | <input type="checkbox"/> I know which official agencies or professionals I may need |

## 5. Prepare the offer and customer experience

|                                                                                                      |                                                                                    |
|------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| <input type="checkbox"/> I finalized the first product or service I will launch                      | <input type="checkbox"/> I wrote a clear description of the offer                  |
| <input type="checkbox"/> I set pricing and payment methods                                           | <input type="checkbox"/> I decided how orders, appointments, or delivery will work |
| <input type="checkbox"/> I created basic policies for processing, cancellations, returns, or refunds | <input type="checkbox"/> I prepared packaging, instructions, or client documents   |

## 6. Prepare to sell

|                                                                           |                                                                                       |
|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> I selected where I will sell                     | <input type="checkbox"/> I created or planned product photos and descriptions         |
| <input type="checkbox"/> I prepared a basic website or selling profile    | <input type="checkbox"/> I created a simple launch and marketing plan                 |
| <input type="checkbox"/> I identified how I will reach my first customers | <input type="checkbox"/> I tested all links, payments, forms, and contact information |

## 7. After launch

|                                                                                |                                                                                        |
|--------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> I will track sales, expenses, and profit              | <input type="checkbox"/> I will ask customers for useful feedback                      |
| <input type="checkbox"/> I will review which products or services perform best | <input type="checkbox"/> I will avoid expanding faster than demand and cash flow allow |
| <input type="checkbox"/> I scheduled a 30-day and 90-day business review       |                                                                                        |

## My next step

|                                              |  |
|----------------------------------------------|--|
| <b>The next action I will complete:</b>      |  |
| <b>I will complete it by:</b>                |  |
| <b>The information or help I still need:</b> |  |

**You do not have to complete every step in one day. Work in order, confirm official requirements, and build at a pace your money and life can support.**

For educational purposes only. This checklist does not provide individualized legal, tax, accounting, insurance, licensing, or financial advice.