



Checklist for Steeling Your Foundations

This checklist covers the foundational pieces every business needs to start strong and grow with confidence. From financial planning to operational essentials, use it to ensure nothing is overlooked on your journey to success.

Basics

Name your business

Define your business's purpose

Create core values

Create mission statement

Obtain Employer Identification Number

Get a Registered Agent

Decide whether you will incorporate your business or not

If incorporating, file the necessary paperwork

Financial Management

Current Business Income

Goal Business Income

☐

Get a Bookkeeper or
Accountant


☐

Decide on a
bookkeeping software
to use


☐

Create a budget

Business Structure and Planning




Choose a business structure (Sole Proprietor, Partnership, LLC, Corporation)




Decide on the internal structure (think chain of command) of your business

Operational Plans




Create a disaster plan
(natural disasters,
active shooters,
untimely deaths, major
injuries etc.)




Create file organization
procedures (how client
information, project
documents, employee
files, etc. are handled,
moved, and stored)



Create a plan for
scaling your business



Create a rhythm plan
(how the company
handles peaks,
slow periods, worker
shortages, system
failures, etc.)



Create a succession
plan (who gets control
of your company when
your time is up?)

Funding

Write out a detailed plan for
obtaining funding for your
business

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