

The Business of Business

January 2019 Checklist

Legal

- Find a small business lawyer to work with long-term.
- Form your LLC in the state you live in.
- Get Errors & Omissions insurance. Ask your lawyer who they recommend. I use [Couch Braunsdorf](#).
- Consider getting disability insurance
- Verify your car insurance and homeowners/renters insurance will cover you if/when your car/laptop/etc are used for business purposes. If not, fix that.
- Get a standard contract to use for all clients. Your lawyer can help with this.
- Get a business license from your city/country.

Finances

- Find an accountant. Your lawyer can recommend one. The magic words here are “CPA.”
- If you're over \$100k/yr: ask your CPA if they can do your books too, or if they can recommend a bookkeeper.
- Set up Quickbooks Online. Give your accountant access.
- Create a budget for your business.
- Set up your business bank accounts: Incoming, Salary, Profit, Expenses, Taxes
- Optional: Get a business credit card.
- Set up a monthly payment to yourself from Salary to your personal account.
- Move ALL business expenses to the business credit card/debit card.

Systems

- Write up your sales/lead process/conversation script.
- Write up your client onboarding and client off-boarding process.
- Email all of your previous clients for testimonials. Add this to your project delivery process.
- Email all of your previous clients for referrals. Add this to your project delivery process.
- Schedule follow-ups with all of your current and previous clients. Add this to your sales process.
- Add these dates to your calendar:
 - IRS/state quarterly taxes: Apr 12, 2019, July 12, 2019, October 11, 2019, January 14, 2020
 - Business license renewal (check with your city/county for the date)

Looking the Part

- Buy a domain for your company.
- Set up Google Apps/Office 365/whatever on your domain. Use this for all business communication.
- Set up a basic website on your domain. Put all testimonials, articles, and portfolio projects on it.
- Optional: get physical mailbox that isn't your apartment/house (eg, UPS Store has them)
- Decide if you're an “I” or a “We” and why. Ensure your marketing and emails are consistent.