



THE ULTIMATE BUSINESS LAUNCH CHECKLIST

Starting a business doesn't need to be overwhelming! Use this guide to check off every box and get your business ready to launch today.

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Write a business plan

- Executive summary
- Business description
- Market research & competitor analysis
- Financial projections
- Business structure & operating plan
- Goals, objectives, & KPIs

Estimate startup costs

- Create a startup budget
 - One-time startup costs
 - Overhead costs (office rent, utilities, etc.)
 - Labor costs
- Create a dedicated startup savings account
- Research available grants, startup services, & other resources

Register your business

- Choose a structure (sole proprietorship, partnership, corporation)
- Choose a business name
 - Claim a domain name
 - Claim relevant social media handles
- Register your business
 - Check provincial & local registration requirements
 - Register trademarks

Open accounts & obtain permits

- Open a Business bank account
- Obtain a CRA Business Number
- Get licenses & permits
 - Check local business licensing requirements
 - Obtain industry-specific permits (e.g. building permits, OSHA certifications, etc.)
 - Obtain a PST Number, if necessary

Create a financial accounting system

- Hire a bookkeeper/accountant
- OR**
- Set up essential bookkeeping documents
 - Income statement
 - Balance sheet
 - Cash flow statement
 - Bills & invoices
 - Expense tracking
- Purchase accounting software (optional)
- Estimate your tax liability

Create a management system

- Create an organizational chart
- Purchase project management software
- OR**
- Set up essential management tools
 - Calendar & scheduling system
 - Budget tracker
 - Team management system
 - Short- & long-term goals and timelines
 - Choose & track KPIs

Launch branding & marketing

- Determine brand guidelines
 - Design or commission a logo
 - Select a color palette
- Create a website
 - About Us page
 - Contact information
 - Site menu/navigation bar
 - Core services & pricing
 - Online ordering
 - Customer testimonials
 - Company blog
- Set up relevant social media accounts



LET'S STAY CONNECTED!

We believe in making bookkeeping and navigating your business finances as easy as possible for small business owners. We'll be here when you need us!



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admin@accrualbusiness.com

[HTTPS://ACCRUALBUSINESS.CA](https://accrualbusiness.ca)