

The background of the title section is a photograph of a wooden desk. On the desk, there are several papers, a brown paper bag, and a green plant in the background. The text is overlaid on a semi-transparent dark grey shape.

The Ultimate Checklist when setting up your service based business

So you feel excited to start your service based small business but also feel overwhelmed as to how to go about it. You've spent hours searching the internet for every piece of information you can find but you are not finding it easy going.

I know what that feels like, you want to be clear about what you need to start your business but the information out there is lacking. That is why I have put together this checklist. Not every step will be necessary and you don't have to do everything before launching your business but at least this will make you aware of the steps you can or should take.

I've kept this brief so that it's easy to run through but if you want to go into more detail on each topic, watch out for my emails and check out my blogs and social media where I go into more detail.



Initial Set Up...

- ☐ Identify the service you want to offer
- ☐ Identify your unique selling point (USP)
- ☐ Research the viability of the service you want to offer
- ☐ Establish any financial requirements to start the business and where this will be sourced
- ☐ Choose your business set up - sole trader vs Limited Company - seek professional advice if in doubt
- ☐ Choose your business name
- ☐ Decide on your business location
- ☐ Open a business bank account
- ☐ Secure your website domain
- ☐ Secure your social media handles
- ☐ Set up your office/workspace and purchase any equipment and supplies necessary
- ☐ Get appropriate insurance
- ☐ Set up an email address in your business name eg yourname@yourbusiness.co.uk



Marketing Set Up...

- ☐ Research and decide on your target audience
- ☐ Draw up your ideal client persona
- ☐ Identify your ideal clients pain points
- ☐ Set your marketing goals
- ☐ Set your marketing budget
- ☐ Write your message to your target audience
- ☐ Decide on which channels/medium you will use to reach your target audience
- ☐ Determine your business vision and mission
- ☐ Identify how you are going to capture your leads (Lead Magnet)
- ☐ Identify how you are going to nurture your leads
- ☐ Identify how you are going to sell to your leads
- ☐ Identify how you are going to get referrals
- ☐ Identify how you are going to get reviews
- ☐ Choose how you will build authority/credibility
- ☐ Write your elevator pitch
- ☐ Determine your offer, packaging and pricing

Marketing Set Up Cont'd...

- ☐ Decide on your branding including logo, colours, typography, tone of voice, image style and vocabulary
- ☐ Put together your content posting plan/calendar
- ☐ Identify how you are going to measure your marketing
- ☐ Using the above information create your marketing plan
- ☐ Create your website
- ☐ Optimise your website with SEO
- ☐ Create an on brand email signature
- ☐ Develop your lead magnet
- ☐ Create Google Business profile
- ☐ Research and attend Networking groups if appropriate
- ☐ Create content for posting on social media/blogs/email etc
- ☐ Put together your media pack
- ☐ Set up your email sign up, nurture and sales funnels
- ☐ Develop your story for sharing and identifying with your audience





Operational Set Up...

- ☐ Set up an online drive so sharing and accessing documents is easy
- ☐ Set up a computer backup system
- ☐ Understand your operations and delivery
- ☐ Review your need for employees or contractors
- ☐ Buy the tools you need to do the job
- ☐ Set up a CRM System (customer relationship management system)
- ☐ Register with ICO so you are GDPR compliant if required (check their website to confirm)
- ☐ Register with any other necessary authority connected with your chosen service
- ☐ Determine how you are going to measure your success (KPI's - Key Performance Indicators) and set up for monthly reviews
- ☐ Set up your office/workspace and purchase any equipment and supplies necessary
- ☐ Create your enquiry process
- ☐ Create your onboarding process and documents including contract if required
- ☐ Create your offboarding process and documents
- ☐ Create your after sales care process
- ☐ Draw up customer journey and ensure minimal friction



Operational Set Up Cont'd...

- ☐ Set up a system for recording your finances, income and expenses
- ☐ Decide on your business operating hours
- ☐ If you are appointment based, set up your online diary so that your clients can book their own appointment when using a link
- ☐ Draw up your service promise
- ☐ Draw up your terms and conditions
- ☐ Review if you need business cards/flyers and arrange for them to be designed and printed if required

Hi! I'm Ruth

I help service based small business owners create client-focused businesses so they convert and retain ideal clients again and again.

Can I help you do the same?



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