

Business Start-Up Checklist

**Company Set-up**

* Setup Business Corporation at your local Registry: Corporation, Limited, Ltd, Partnership, etc. OR remain a Sole Proprietorship (operate under your own SIN number and claim income under personal taxes). No setup required at Registry for Sole Proprietorship.
* If you register numbered corporation make sure to register your preferred business name as well with Registry. For example: 1710000 Alberta Corp is operating business as 123 Closets.
* Call Government of Canada and register for a GST and PST number (whichever is applicable)
* Get business insurance (2 Million Dollars Min) and commercial vehicle insurance
* Get bonded with insurance company
* Get WCB or equivalent in your city/province
* Register your business with your city hall home or commercial space.
* Setup Prepaid Contracting Business License with your City/Province (If Applicable)
* Setup your business Bank Accounts and Credit Card
* Find a good accountant and or program to help you record/track your expenses for your year end.
* Business Cards – Print in small number because you will make changes and until you have a final version there is no need to waste money.

**On-Line Platforms Set-up**

(Use your discretion as to when to purchase the following suggested items)

* Reserve your operating business name with www.Netfirms.ca and make sure to purchase .ca and .com for the same name. Setup the domain name on Auto Renew so you don’t lose it.
* Create a website. It is best to hire a company or person to do this for you that has experience. Our marketing company can create a microsite for you so let us know if this interests you? Microsite is a mini version of our website with its own independent links and address. It is best to research your options and get a few quotes. Keep in mind you can purchase high resolution images from various online platforms for your website and marketing needs.
* Setup an email account for your business. Either a regular free Gmail account or professional email account through Google Enterprise that you pay monthly for. So, you would have an email that reads [JohnBrown@123Closets.ca](mailto:JohnBrown@123Closets.ca)
* Setup all Social media platforms (you need an email address for this). **Facebook**, **Twitter**, **Instagram**, LinkedIn, Pinterest, Houzz and Google+ are just some of the main platforms regularly used. The bolded items are commonly used.
* Google Drive is a great cloud based storage space for all your client folders etc. You get 15 GB for free so we suggest you use it. We can always explain this more by demonstrating what we have setup. You can access all your files on Google Drive from your phone!
* Setup a business calendar that you can share with your team and track all changes, etc. So nothing gets missed. We recommend Team Up. You can also access this calendar from your home computer, laptop or phone app.
* Find a CRM that helps you keep all client information, sold projects, lost and or won projects in one place so you can do future marketing to these clients and have these individuals become repeats. We use PipeDrive.
* Office programs such as PDF, Excel, Word etc. have been of great use for us.
* Good unit converter app so you can easily convert mm to inches
* Credit Card Software that allows you to accept credit cards. We use Payfirma but there are lots for you to choose from so shop for rates.
* Having an Invoicing App for contractors, etc. is also a good idea. We use the free program ‘Wave Accounting’ but your accountant may have other suggestions.
* Start looking at Warehouse space that are for lease or rent (month to month) for when you no longer can use your garage. Try to keep your overhead low and do month to month if possible, this way you have the option to cancel at any time.
* For ideas on how to setup warehouse shelving/space we have given you suggestions on the Dealer Portal. Use clear containers to see emptiness level of hardware’s easier.
* Vehicle setup pictures are also on the Dealer Portal
* Vehicle Wrap for advertising. Research options available to you and cost. Magnets may be a cheap alternative.

**Perfect Fit Distributor Setup**

* Sign Contracts
* Setup 2020 design software license
* Order Sample Bag and
* Recommended Hardware – order this sooner than later so it gives you time to setup and organize your space.
* Sales Setup: Tablet, Chargers, Pen, Tape Measure, Laser Tape Measure, Space Assessment Sheets, Sales Sample Kit, VR Goggles.
* Install Setup: Gather Tools on Tools List, Organize bags, Organize Parts into organizers.
* Training Videos. Watch Sale, Design and Install videos on the Dealer Portal and practice designs. Measure your own closets, friends’ closets, etc. and produce a quote for a client.
* Practice sales and installation on your own home and homes of friends and other family members. Give them a deal on price and I am sure they would be happy to help out!

**Lead Generation…**

**Network, Network, Network.**

* Join various social media and groups that you want to target. Follow the 80/20 rule. 80% helpful content and 20% of your sales pitch. Educate & inform!
* Start posting to all of your social media platforms, at least twice a week. Buffer is a great way to stay organized on social medial hassle free. It’s a great dashboard that allows you to post to all social medial platforms from one spot.
* Start Networking in a local BNI group and meet likeminded people
* Contact Local Builders in your area and promote yourself
* Sponsor local sports team or plan a community event
* Talk to local realtors and offer incentives
* Create awareness in your community about who you are, what you offer and why you are better. Find your niche! We offered complimentary tear away of existing wire material, a quick patch job of the holes and got it paint ready all prior to installing our material. All in the same day.
* Invest in ‘low hanging fruits’ market on FB Ads and Google AdWords to get leads. This cost can add up so make sure to set a budget and educate yourself!
* Put up H-Signs on the sides of the road or meridians in communities you want to target. In Calgary, we can put signs up for free as long as the back of the sign has our contact information for the City and the signed is moved every few weeks.
* Post office mail-outs of postcards or magnets. This allows you to hit a targeted audience and location.
* Contests and Giveaways
* Billboards – this can add up quickly so you want to be sure of your location, traffic and demographic.
* Referral program – Have one in place. Don’t be afraid to ask clients and neighbors, friends, etc.
* If you are installing a job be sure to hand-out cards to the neighboring homes.