

52 ESSENTIAL STEPS FOR START-UPS

A ONE YEAR PLAN TO SET UP LASTING BUSINESS GROWTH

If you've recently ventured out into the thrilling journey of starting up a brand new business, then we've got the ultimate checklist for you. A complete step-by-step break down of every single thing you will need to do to turn your exciting business idea into a living, breathing reality. As you look through these pages, imagine yourself going ahead and ticking off just one of these items each week. In a year from now you'll be miles ahead of the vast majority of business owners who stop and start in bursts and never really make it through to fulfil their ambitions.

The Problem:

Knowing where to start when setting up your new business can be overwhelming and confusing, especially if you've never done it before. Start-up veterans will tell you how frustrating it is to have time consuming odd jobs popping up all over the place. We know from experience - If you don't manage it all well from the start, these annoying little tasks will get in the way of you actually doing business.



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"In business it's very easy sometimes to have a great idea get wasted and put on the "to do" list and never get it done. Well not with Kerry, I came to her with an idea and she said yes I can make that happen for you."

Daniel Burgess - The Phoenix Experience

The Solution:

Finding a way to stay on top of all the nagging details, which really do need to be done when setting up shop, can save you time, money and wasted effort. There's no need to reinvent the wheel with your new business. We know how tough it is to get started, so we've made it easy for you with this 52 Step Checklist.

If you follow the steps laid out here for you in plain black and white you are guaranteed to minimise the effort it takes to start your new business. Make the most of your time! Experience the satisfaction! Know you've ticked all the boxes! Now you can really get down to business.



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"When you're a small business owner, it can be hard to get everything out of your brain, onto paper, but Kerry Anne helped us do just that. I completely recommend working with her!"

Melanie McVean - Founding Director, No Pong

Establish Your Brand

1. Nail a clear description of your Ideal Customer/Client Avatars:

- One primary avatar, describing what your most ideal, (or perfect), client is like
- At least two secondary avatars describing what your almost perfect customers/clients are like

2. Choose a Business Name

- Make your business name catchy but still clear about exactly what you do

3. Design Business Logo

- Unless you are a natural at visual design and branding, professional advice is always wise here to craft an image that best represents your business brand

4. Create Tagline

- Play around with words and have fun coining a phrase that shows your target market the benefits your business offers

5. Create Business Brandbook

- Developing a branding guidebook is the fast track to all of your design projects moving forward. Include your brand values, colours, fonts, mood and feel, metaphors and symbols, design principles, and styling guide

6. Create Brand Collateral:

- Work with a designer to develop a theme that runs across your business resources including Business Cards, Email footer, Brochures, Staff Uniform, Car Signage, Roll Up Banner

7. Set Up Personal Branding:

- Pull together descriptions, notes and photos around the message you convey with your personal colours and styling



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Set Up Shop

8. Register and Trademark Your Names:

- Register your business name to get an ABN
- Register your domain name(s)
- Trademark your business name and logo

9. Create Business Email Account

- Think carefully about how your email address reflects your company brand. Do you want to be info@your business? Or hello@yourbusiness? Perhaps service@yourbusiness? The email address will set a tone for your online correspondence so be strategic

10. Create or designate Business Phone Number

- For many startups your own phone will be the business phone, so remember to change your message to reflect the business welcome you want to give when you can't get to the phone

11. Set Up Shopfront/Office/Workspace:

- Whether you are working from home, a shared workspace, shopfront, office or warehouse, you will need a physical place to work. If this space will be public, remember your branding clearly across signage, fit-out, design and styling

12. Set Up Online Filing:

- Create a cloud based filing system organised by business departments so you have a place for everything from day 1



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Be Seen Online

13. Build your website

This is a project with potentially endless upgrades and infinite budget. Be smart with your management of this in the early days and remember that simple is perfectly fine, as long as your business message is clear and professional for those who visit your site. Get advice from an expert about the best ways to optimise your site for search engines

14. Set up Google Analytics

A website without analytics is like a race without a timer. Developing the habit of keeping track of website activity right from the start will mean you make informed decisions with content, messaging, offerings and functionality in future

15. Set Up Google My Business Page

It makes sense to utilise the free platform provided from the world's biggest search engine. Your Google My Business page will instantly put you at the top of searches when people are looking for you

16. Set Up About.Me Page <https://about.me/>

Another free tool to maximise your online profile and shout your business message from the rooftops. You just never know who's searching for you

17. Write and/or Record Blogs

Developing the routine habit of creating high quality content will set you up for success in your content marketing and SEO. Have a bank of content ready to roll out to boost your launch and maintain traction with your increasing audience

18. Write and/or Record Media Releases

Being published in mainstream media or seen on TV is a fantastic way to position your business and boost your profile. Develop some catchy stories and let journalists do the work of promotions for you

19. Update Social Media

Update your existing profiles on all platforms to reflect your new business message and create brand new business pages on relevant platforms



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Build Management Infrastructure

20. Engage Business Mentor

Even the most successful entrepreneur will tell you that having another pair of eyes on your growing business is wise. 92% of successful business owners say having a mentor contributed directly to their success. Follow their lead!

21. Employ Accounting & Legal Services

From registering the business, to navigating contracts and agreements, to keeping in the good books of the ATO, it pays to have a trusted advisor in these two professional fields. Don't be fooled into thinking you can do it yourself. That short cut will likely turn into the long way around

22. Develop a thorough Business Plan

There are endless pathways and strategies you can take in building your business. Investing time into developing a clear plan will help you see the wood from the trees when it comes to deciding which road to take along the way

23. Map out Five Year Growth Plan

Setting goals without deadlines is like making a wish list for Santa. Create business milestones to work towards over the coming years, plot them on a calendar, then revise them at least twice per year so you know you are staying on track



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24. Set Up Default Diary

Setting out a default schedule is a powerfully productive approach to take with your time management. Block out the times you will take to cover the business essentials so you are never caught putting out fires that become desperately urgent because time wasn't set aside



25. Create Business Culture Handbook

In a similar way to your Brand Book, your Business Culture Handbook will lay out the cultural parts of your business that are largely intangible and hard to grasp. The more you can clarify your core business values, language and ethos, the better you will be able to lead growth that stays aligned with your original intentions

26. Create Business Management Manual

Recording all your business details as you go will save you countless amounts of time in managing the daily work in your business, and in training staff as you grow. Up to 17% of workplace productivity is lost simply by people losing things. Record all accounts, profiles, contacts, routine procedures, registration dates and administrative requirements as you go

27. Create Compliance Handbook

Having one document dedicated to recording all of your compliance requirements will also save you time and stress in managing your business administration. Record all of the resources you need to stay on the right side of the law with schedules for registrations, licensing and accreditation, and inspection requirements and deadlines

28. Create Human Resources Manual

Similarly, developing one central document for managing all staff matters as you grow will help minimise stress and maximise clarity. Even setting up a template that is blank for now will mean the skeleton is there for you to flesh out when the time comes for your first hire. You don't need to have staff to develop business policies. The future you will be glad you started this early

29. Create Organisation Chart

Even a sole trader will find value in mapping out the structures of their business and all of the different roles that are required to keep the business running. This diagram will show you areas for delegation better than anything else can



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30. Design Staff Onboarding Process

Creating a simple checklist now will put you firmly in a growth mindset even from these early days. The list might only include a few items, but it's a starting point to grow from as you expand

31. Develop Staffing Plan

Identify the areas of work you enjoy, you are good at, and that will be profitable for you to retain as your business grows. Then map out the things you don't enjoy, you're not good at, and it would be more profitable to be delegated. Knowing what to hold onto and what to let go of is key to lasting growth

32. Design Professional Development Plans

Forward thinking and planning will pull you through the early days into focused, targeted action. Start brainstorming now the types of things you want to learn to make you a better business leader, and also the things you want your staff to learn to help you achieve your business goals

33. Create in-house Technology User Guides

Include a secure place for the storage of logins and record all relevant steps for the every day use of main business Software

34. Create Compliance Handbook

Having one document dedicated to recording all of your compliance requirements will also save you time and stress in managing your business administration. Record all of the resources you need to stay on the right side of the law with schedules for registrations, licensing and accreditation, and inspection requirements and deadlines

35. Set Up Task Management Software

Whether you start with a simple day planner, a set of checklists in Process St or you create a sophisticated system in more advanced software, you will need a tool to manage daily tasks. Make sure you don't make the common mistake of using tools designed for managing projects



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Prepare Your Financials

36. Create Business Bank Account

Spend time shopping around to find a bank with little to no fees and great business features

37. Set Up Accounting Software

The old shoebox approach is not OK for business owners building an operation that lasts. We use Xero here at Operation Verve, but shop around to find a platform that suits you

38. Set Up Business Budget

Set up tools that let you know your numbers now. Establish how much revenue you need to break even and push through into profit, and keep an eye on your expenses along the way

39. Create Cashflow Projections

Map out what your business could look like over the coming months and years by estimating the impact of reaching sales goals to give you a ball park profit target to aim for

40. Set Up A Platform To Receive Payments

It's all about bringing in the money, right? Make sure you have smooth ways of facilitating those vital transactions by setting up a bank merchant facility, a paypal account or using software such as Square reader



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Establish Your Products & Services

41. Clearly Define And Record Your Offerings

Being clear on exactly what you sell and having this information on hand is a vital part of providing excellent customer service. Every business should have a catalogue with descriptions and pricing, but this is especially important for service providers who offer packages that need to be understood by the client to be purchased

42. Map Out The Delivery Of Your Offering

Being crystal clear on exactly how you will deliver your products and services will allow you to craft an outstanding customer experience every single time. Take care with the details to earn referrals and rave reviews

Get Selling!

43. Design Marketing Plan

Make some decisions around which platforms you will use to take your business to market, and map out the activities you will do across each one so you have a clear plan for the content you need to create, the budget you have to spend, and the timing of the promotions

44. Create Promotional Library For Each Offering

Develop bank of resources you will use to promote each product or service offered through your business. You will need compelling text, videos and images to spread the good news to your target market and prompt them to take action

45. Create Business Promo Videos

As far as social media goes, video is miles ahead of every other type of content for user engagement, so to be in the game, you have to jump in to video marketing. Your budget will dictate what you do on this front, but the key ingredient of success is that your videos appeal to your target audience and bring them value



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46. Create Social Media Content Libraries

Along with promotional content comes the educational content that establishes you as an authority in your industry who provides solutions to your target market's problems. Work on developing high quality posts, videos and images to publish across the social media platforms that your target market uses

47. Set Up A CRM

Managing the communications you have with your prospects and clients is a pivotal part of your ongoing business success. Using dedicated Customer Relationship Software such as Pipedrive, Hubspot or Infusionsoft will allow you to automate your communications with them without being tied to your computer all day long

48. Create Lead Magnets

Continually adding to the list of people who are actively engaged with your business message is a strategic way to grow your audience and market to them specifically. Create high value resources such as downloadable PDFs like this one, webinars, newsletters or events where people opt in to get the free offering in exchange for providing their contact details. These details will be automatically stored in your CRM

49. Design Sales Funnel & Nurture Sequence

Once your CRM is set up and a lead magnet created, you can then map out the stages of the journey your prospect will take to become your customer. Decide what you will offer at every point of that experience to give them enough opportunity to come to know, like and trust you



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Develop Strategic Partnerships

50. Create Referral Wheel

They say your network determines your net worth. Create a diagram which shows which industries have the potential for creating the best referral partners. For example, as a process consulting business, we like to connect with business coaches, VA supply companies, and HR specialists. Ask yourself “Who sees my clients before I do?” to establish your best referral partners

51. Become A Group Member

Joining up with high calibre Industry Groups, Professional Associations and Networking Groups can give you the fast track you need to developing a circle of people who become your mentors, referral partners and even customers

52. Gather Testimonials

There is nothing more powerful than a testimonial from your existing customers to convey the quality of your business products and services. Start building these as early as you can and save them for future use in your marketing materials



“No nonsense content, references, examples, templates, explanations, a clear strategy and how to implement it. Awesome. Thank you so much!”

John Cirak - Relationship Coach



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Where To From Here?

Just using this checklist shows how serious you are about turning the pipe dream of running a successful business into a reality. Whether you take your time or you go at it like a bull at a gate is up to you, but now you've got everything you need to get started with confidence.

So what's next?

You don't start something this serious just so that you can flail about, drowning in the day-to-day pressures of running a successful business, do you?

Business owners who have made it through from being dreamers to doers know the importance of building on solid foundations. They know that excellent systems create businesses which run like well-oiled machines. If you want help with creating super-successful systems yourself, then grab your copy of 'Freedom Machine' now.



"The more you learn, the more you earn. Freedom Machine is the shortcut you need to understand and implement systems and processes. Commit to making a positive change and your efforts will take your business to new heights."

**Dale Beaumont, Business Speaker,
Author & Mentor, Business Blueprint**

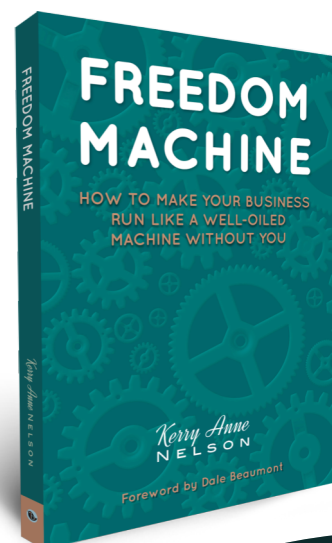
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ABOUT OUR DIRECTOR

Kerry Anne Nelson is known amongst her friends, family and clients to be a woman obsessed with formalising workplace processes to make things run smoothly. It was no surprise to her community when she decided to turn that into her career. Kerry Anne's life experience almost brought her to her knees when her husband passed away unexpectedly, and she was left to salvage a business that had no systems or processes in place. It was a nightmare.

Since then, Kerry Anne has become Australia's most passionate advocate for systemising businesses. She takes business owners by the hand to help them avoid the pain of managing their staff without documented processes. She has so much to offer after two decades of hands-on practical experience growing her own businesses across service and retail industries, in both online and brick and mortar outlets. Kerry Anne now works as a workplace process architect. She uses her Lean Six Sigma training to maximise her years of experience in strategic management, workplace training, business events, and team leadership to help clients achieve take huge strides towards their ongoing business growth.

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