

BUSINESS READINESS CHECKLIST



LAUNCH DATE _____

COMPANY _____

LEGAL
STRUCTURE _____

LEGAL STRUCTURE

1.
 - ☐ Choose your business entity (LLC, Corp, etc.)
 - ☐ File Articles of Organization/Incorporation
 - ☐ Create an Operating Agreement or Bylaws

OPERATIONS

2.
 - ☐ Draft client contract templates (service agreement, NDA)
 - ☐ Set up EIN and open a business bank account
 - ☐ Register for required licenses and permits

SYSTEMS

3.
 - ☐ Set up CRM for lead tracking
 - ☐ Implement project management system (e.g., Trello, Asana)
 - ☐ Automate intake/scheduling
 - ☐ Establish invoice and payment process

MARKETING

4.
 - ☐ Launch branded website with contact form
 - ☐ Claim/update Google Business Profile
 - ☐ Create basic marketing plan and post schedule

Docsnexus can help you every step of the way. Contact us today for help completing each of these tasks!