

New Organizing Business Checklist

Geralin Thomas shares all her tips in the 6 Steps for Starting a Professional Organizing Business.
Professional Organizer Training.



Getting Started

- ☐ Research the professional Organizing Industry
- ☐ Read organizing books and organize blogs
- ☐ Research business advice websites (Vistage.com, sba.gov, eonetwork.org)
- ☐ Join a networking organization (chamber of commerce, napo.net, etc.)
- ☐ Find a mentor, coach, or business consultant
- ☐ Develop a niche or area of expertise
- ☐ Name your business and develop tagline
- ☐ Buy domain(godaddy.com)
- ☐ Check With Secretary Of State for name availability and file DBA

Legal

- ☐ Write business plan
- ☐ Decide entity(Sub-S Corp, LLC, etc.)
- ☐ Register name with Secretary Of State and Other local agencies
- ☐ Research tax requirements for your State and register with Dept of revenue
- ☐ Purchase business insurance (Liability, Umbrella, Errors & Omissions)

Banking

- ☐ Complete federal SS-4 form and obtain an EIN number
- ☐ Open business bank account and purchase checks & deposit slips
- ☐ Get a business debit card and/or credit card
- ☐ Set up a merchant account to accept credit cards or a service like PayPal

Logistics

- ☐ Set up your desk and Office space
- ☐ Set up a phone number and voicemail message
- ☐ Purchase a computer and business equipment (scanner, printer, headset)
- ☐ Create an email signature line that includes area code and phone number
- ☐ purchase a backup system for your computer (Carbonite, Mozy, etc.)

Doing Business

- ☐ Estimate your business costs & develop a budget
- ☐ Define how you price your services and your rates (hourly, packages)
- ☐ Establish billing policies
- ☐ Develop services agreement and subcontractor agreement
- ☐ Purchase and accounting software or create invoicing system
- ☐ Decide if you want to hire a bookkeeper or accountant

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