GUARDIAN STONE CARE & RESTORATION

Business Launch Checklist

Work through this list in order. The chapter numbers show where each step is explained.

Before you spend money

- ☐ Read Part One and answer the self-assessment questions (Business Manual, Chapter 1)
- ☐ Choose a starting mix of two or three services (Business Manual, Chapter 2)
- ☐ Complete a weekend market survey of your working radius (Business Manual, Chapter 3)
- ☐ Work out your real hourly cost (Business Manual, Chapter 9 and Worksheet I)
- ☐ Do at least two practice jobs and time every step (Business Manual, Chapter 2)

Setting up

- ☐ Check that your business name is available in the state registry and online (Business Manual, Chapter 4)
- ☐ Form the LLC and name a registered agent (Business Manual, Chapter 4)
- ☐ Sign an operating agreement (Business Manual, Chapter 4)
- ☐ Get a free EIN from the IRS (Business Manual, Chapter 4)
- ☐ Open a business bank account and a separate tax savings account (Chapters 4 and 11)
- ☐ Ask about local business licenses and sales tax registration (Business Manual, Chapter 4)
- ☐ Buy general liability and tools cover; ask about damage to the property you work on (Business Manual, Chapter 5)
- ☐ Fill in and save a W-9 (Business Manual, Chapter 4)
- ☐ Set up bookkeeping with the categories in Chapter 11
- ☐ Assemble the starter kit for your services only (Business Manual, Chapter 7)

Paperwork ready

- ☐ Service agreement reviewed by an attorney in your state (Appendix A)
- ☐ Change order form (Appendix B)
- ☐ Volunteer release (Appendix C)
- ☐ Price sheet (Appendix D)
- ☐ Permission letter, estimate, report and job-day forms (Worksheets)
- ☐ Certificate of insurance on file, and a way to request certificates quickly (Business Manual, Chapter 5)

Finding the first customers

- ☐ One-page leave-behind with honest before-and-after photographs (Business Manual, Chapter 13)
- ☐ Simple website or listing with services, area and contact details (Business Manual, Chapter 13)
- ☐ Customer list started with every lead you know (Business Manual, Chapter 12)

- ☐ Introduce yourself to town clerks, cemetery committees and societies (Chapters 12 and 15)
- ☐ Book at least two talks for the coming season (Business Manual, Chapter 13)
- ☐ Introduce yourself to a conservator you can refer work to (Business Manual, Chapter 8)

After the first season

- ☐ Compare estimated and actual hours on every job (Business Manual, Chapter 9)
- ☐ Review prices and update the price sheet (Business Manual, Chapter 9)
- ☐ Send thank-you notes and offer maintenance agreements (Business Manual, Chapter 17)
- ☐ Meet your accountant about the year's taxes (Business Manual, Chapter 11)
- ☐ Plan next year's training (Business Manual, Chapter 8)