



**BOOKKEEP ANYWHERE'S  
BUSINESS PLANNING CHECKLIST  
FOR  
VIRTUAL BOOKKEEPERS**



# THE BUSINESS PLANNING CHECKLIST

## PHASE 1: PLANNING

- TASK 1: Choose a name for your business
- TASK 2: Outline your Unique Selling Proposition
- TASK 3: Budget for start up costs
- TASK 4: Research your Ideal Client
- TASK 5: Decide which services to offer

## PHASE 2: BUSINESS SETUP

- TASK 1: Choose your legal structure
- TASK 2: Register your business name
- TASK 3: Register your EIN
- TASK 4: Open a business checking account
- TASK 5: Decide how you will accept payments from clients
- TASK 6: Purchase your domain
- TASK 7: Setup your Gmail Account
- TASK 8: Setup your Tech Stack
- TASK 9: Purchase Insurance (if needed)

## PHASE 3: BRANDING YOUR BUSINESS

- TASK 1: Get your logo designed
- TASK 2: Create your brand board
- TASK 3: Design and Order Business cards
- TASK 4: Complete the business card challenge
- TASK 5: Create your marketing materials
- TASK 6: Outline your website content
- TASK 7: Setup your Wix website
- TASK 8: Setup your Facebook Page
- TASK 9: Claim your Google Business Listing

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## PHASE 1

## PLANNING

### To Do List:

- Watch the video lesson
- Choose a name for your business
- Outline your Unique Selling Proposition
- Budget for start up costs
- Research your Ideal Client
- Decide which services to offer

# Choosing a Name for Your Business

*Brainstorm 5-10 names that are simple, clear and meaningful*

**Which 3 names do you like best?**

**Google each name. What comes up?**

**Which URLs are available?**

**Which names are available with your Secretary of State?**

# Outline Your USP

**What is your story?**

**What are your skills?**

**What is your experience?**

**Who can you best serve?**

**Who will your story resonate with?**

**Who are you best-suited to help?**

**Who have you helped in the past?**

**What industries get you excited?**

**Who do you like working with?**

**Who needs your services?**

**What pain points can you solve?**

*Brainstorm 3-5 USPs:*

**I help:**

**Get:**

**Without:**

**I help:**

**Get:**

**Without:**

**I help:**

**Get:**

**Without:**

**I help:**

**Get:**

**So They Can:**

**I help:**

**Get:**

**So They Can:**

# Research Your Ideal Client

**What are their personal goals?**

**What are their business goals?**

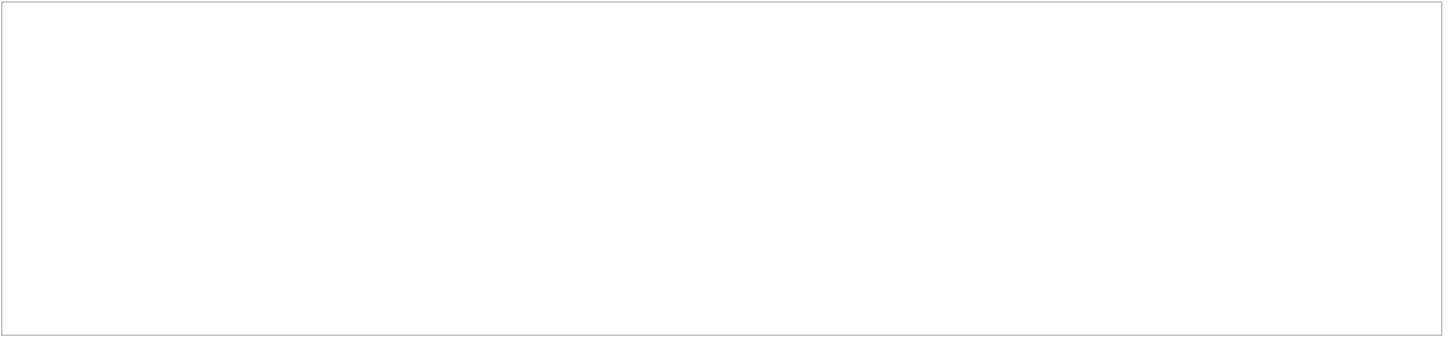
**What beliefs or values drive their decisions?**

**What are the pain points they are experiencing with QBO/Bookkeeping?**

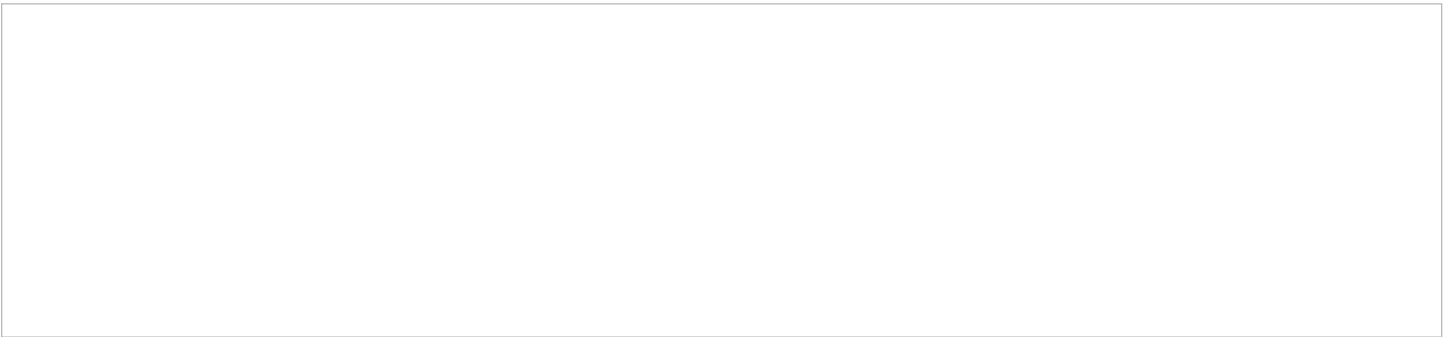
**What are the obstacles or pain points they are experiencing in their business operations?**

**How can you MEET their needs in terms of:**

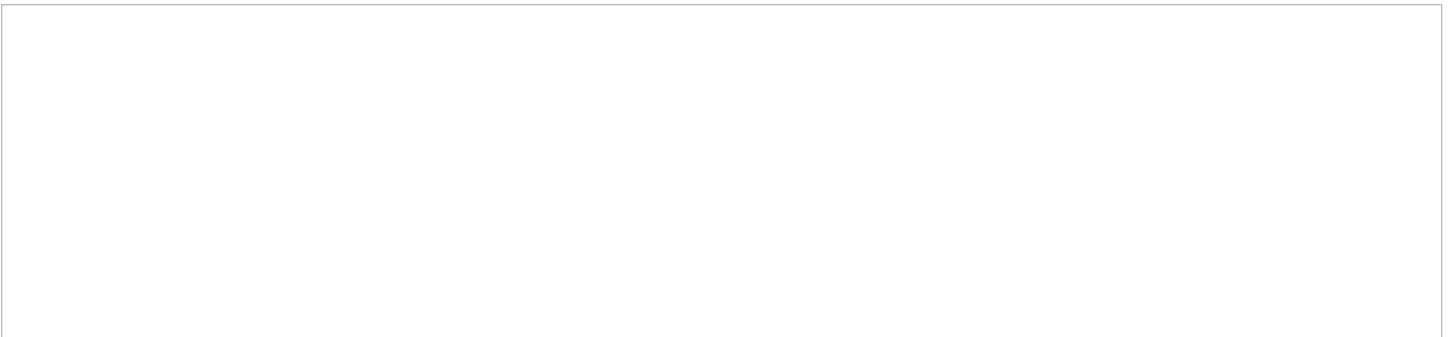
**Money**



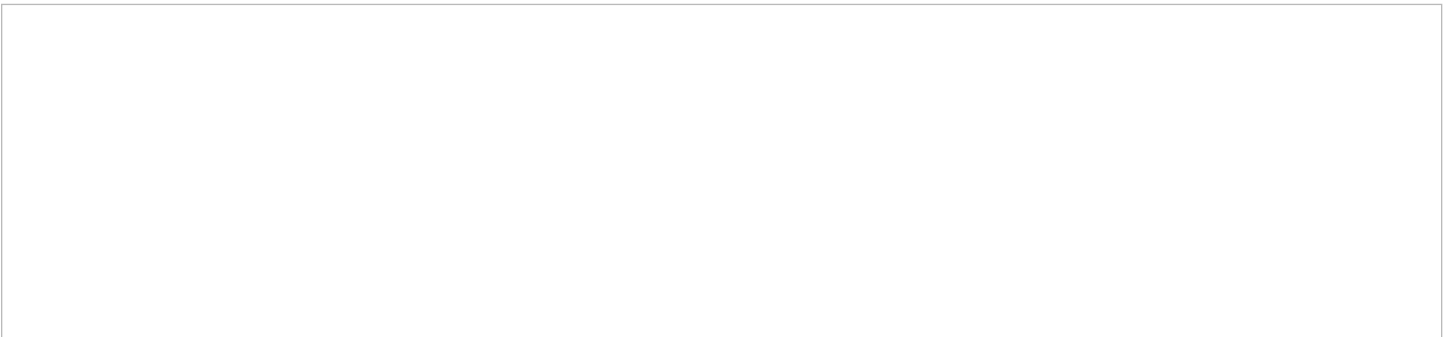
**Emotions**



**Energy**



**Time**



## What do your ideal clients have in common?

- Location?
- Industry?
- Pain Point?
- Phase of business?
- Phase of life?
- Purpose:
- Goals?

## Brainstorm: Who is your ideal client?

## Budget for Start Up Costs

### Brainstorm your startup costs for the following:

- Laptop
- Second Monitor
- Other Computer Accessories (ten key, mouse)
- Business Registration with the SOS
- Office Supplies
- Business Cards
- Paid Subscriptions
- Marketing Costs (logo design, website design)

### How much will you spend monthly to operate your business?

- Office Space
- Telephone
- Internet
- Memberships
- Subscriptions
- Paid Advertising
- Office Supplies
- Virtual Assistant

# Services

**Brainstorm which services you want to provide. Do you want to:**

- Properly Record and Categorize Transactions
- Reconcile bank, credit card, and loan accounts
- Prepare monthly financial reports
- Enter bills to be paid and attach invoices in QBO
- Enter Customer Invoices
- Send statements to customers
- Setup and Administer Payroll
- File and pay sales tax
- Manage Inventory
- Clean Up/Catch Up work to get the bookkeeping up to date
- Accounting Software Training•Consulting
- Cash Flow Management
- Budgets & Forecasts
- Profit First Accounting
- Financial Dashboards
- Job Costing
- Tax Preparation
- Audits, Reviews, Compilations

**How will you charge for your services?**

**Fixed Price:**

**What is your minimum fee to work with you?**

**Hourly:**

**Do you have a minimum number of hours required to work with you?**

**Do you have a maximum number of hours?**

**Value Pricing:**

**What is your ideal average client package?**

**How many clients would you like to bring on at that price point?**

**What packages will you offer clients? What will be included? What won't be included?**



## PHASE 2

# BUSINESS SETUP

### To Do List:

- Choose your legal structure
- Register your business name
- Register your EIN
- Open a business checking account
- Decide how you will accept payments from clients
- Purchase your domain
- Setup your Gmail Account
- Setup your Tech Stack
- Purchase Insurance (if needed)

## Choose your legal structure

There are pros and cons to each entity type. Which structure will best suit your business needs?

- Sole Proprietorship
- LLC
- Partnership
- S Corp
- C Corp

What are the filing requirements for your entity choice?

What documents will you need to file?

How much will it cost to file?

## Register your Business Name

Once you have selected your entity structure, you can file with your state.

- Do a business entity search on the SOS website to make sure the name you want is available
- Complete the filing and follow any rules set by your state
- Watch for the original filing in the mail (may vary by state)

## Register your EIN

- Gather Your Information
  - Legal Name
  - Entity Type
  - Address
  - Name of Responsible Party
  - Reason for applying (usually "Started a business")
  - Date business was started
  - Principal business activity
  - Other (review form SS4)
- Go to: <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
- Apply Online

## Open A Business Checking Account

**What banks are you interested in working with?**

**Do you have a banker you like to work with?**

**What banking services will you need?**

- Business Checking
- Business Savings
- Business Credit Card
- Overdraft Protection

**Schedule an appointment with a business banker and do your research**

- What fees are associated with the account?
- How much are overdraft fees?
- What kind of protection is offered?
- Do they offer merchant services?
- Are there any promotions for opening an account (Chase loves to give you money!)
- What documents do you need to open an account?
  - Original copies of business documents?
  - EIN or SSN?
  - Forms of Identification?
  - Other?

## How Will You Get Paid?

### What kind of services do you need?

- Accept Credit Card Payments
- Accept ACH payments
- Paypal
- Cash
- Checks
- Other?

### There are many options for merchant services. Here are some items to research:

- How quickly can a merchant account be set up?
- What are the associated fees?
- Are there any limitations (ie domestic vs. international)?
- How quickly will the money be in my account?
- Does it integrate with your invoicing or accounting software?
- Will my customers be able to pay online?
- Can I set up recurring payments?

### Here are some ideas for merchant services providers:

- Stripe
- PayPal
- Your Bank
- Square
- Intuit Payments

*\*\* I prefer to use Intuit Payments through my QuickBooks Online Accountant account.*

## Purchase Your Domain

*You should have already done a search to make sure your domain was available before filing with your state. You have many options for purchasing a domain.*

*If you plan to create a website using Wix, I recommend buying your domain through Wix.*

### **Other domain options:**

- Godaddy
- Namecheap
- Other website services (squarespace, clickfunnels)

### **Before completing your purchase:**

- Compare pricing on multiple platforms (not all the same)
- Review how much the domain will be AFTER the first or second year (prices go up)
- Double check your spelling

## Set Up Email

**If you plan to create a website using Wix, I recommend buying your mailbox through Wix. When choosing your email, here are a few things to consider:**

- Will people spell it correctly?
- Is it easy to say over the phone?
- Do I need multiple mailboxes? (info@, sales@, support@, myname@, etc.)

## Setup Your Tech Stack

- Gmail
- Calendly
  - Set up your account
  - Set up your first event
  - Add your photo
  - Customize your description
  - Customize the URL
  - Customize the reminder messages

- Asana
  - Set up your account
  - Add your first project
- QuickBooks Online Accountant
  - Set up your account
  - Get certified
  - Set up your ProAdvisor listing
- Toggl
- Uberconference
- Lastpass
  - Set up your account
  - Download the extension
  - Connect your phone in case you ever forget your password
  - Add your gmail login
  - Add your calendly login
  - Add your asana login
  - Add your QBOA login
  - Add your Toggl login
  - Add your Uberconference login
- Hubdoc and/or Smartvault (if needed)

## **Protect Your Business**

**You may need or want insurance to protect your business.**

- Research the types of insurance coverage you need in your industry
- Get quotes for insurance coverage
- Set up coverage
- Set up autopay to ensure your insurance doesn't lapse



## PHASE 3

# BRANDING YOUR BUSINESS

### To Do List:

- Get your logo designed
- Create your brand board
- Design and Order Business cards
- Complete the business card challenge
- Create your marketing materials
- Outline your website content
- Setup your Wix website

# Get Your Logo Designed

*Brainstorm logo ideas.*

**What do you want your logo to convey?**

**What symbols or images represent your brand?**

**What symbols or images resonate with your niche?**

- Find 3-5 logos that you like to use as inspiration
- Design your logo (try [Canva.com](https://www.canva.com))
- Hire a logo designer
  - Set a budget
  - Send them your design inspiration
  - Send them any colors/fonts you want to use
  - Make sure to ask for the source file
  - Get a transparent background
  - Get a couple of variations for different uses (website, business cards)

## Create Your Brand Board

**A brand board helps keep all of your marketing consistent with your brand, especially if you plan to outsource the design work.**

- Find 3-5 websites or companies that you like to use as inspiration
- Find brand boards on Pinterest for inspiration
- Design your brand board (try Canva.com)
- Hire a brand board designer (I think I paid \$20 for mine)
  - Set a budget
  - Send them your design inspiration
  - Send them any colors/fonts you want to use

## Design and Order Business Cards

- Choose where you would like to order your business cards
  - Moo.com
  - Vistaprint
  - Other
- Design your cards and order

## Create Your Marketing Materials

**You may want other marketing materials designed such as (check the ones you plan to use):**

- Brochures
- Facebook ad images
- Facebook banners
- Pricing and Service Lists
- New Client Onboarding Documents
- New Client Welcome Package
- Email Marketing
- Signs
- Client Forms/Documents
- Proposals

**Before ordering or creating, I recommend:**

- Set a budget
- Set a deadline for delivery
- Send your design inspiration to the designer (or find inspiration for yourself)
- Make sure any colors/fonts you use come from your brand board
- Proofread
- Review a mockup

## **Outline Your Website Content**

**Do you want a one-page website or multiple pages?**

**Does your target audience prefer to click or to scroll?**

**What is your headline?**

**What kind of image or video will be the first thing they see?**

**What is your call to action?**

- Book a call
- Free consult
- Purchase

**What story are you going to tell in the "About" section? What makes you unique?**

**What services are you going to provide?**

**Will you include pricing on your website?**

**Will you have a blog? If so, what kind of content would your ideal client like to read?**

**Do you have testimonials you can share?**

- Ask previous clients to share their experience
- Works best if you send them some questions to answer
- Ask for a picture you can share

**What kind of phone number will you use for your business?**

- Cell phone
- VOIP
- Google
- Grasshopper
- Other?

# Setup Your Wix Website

What websites do you like that you can use for inspiration?

What elements of those websites do you like?

What is important for you to have on your website?

**After you have designed your website:**

- Make sure your domain is connected
- Optimize for mobile
- Proofread
- Click every link to make sure it's working properly
- Add your URL to everything
  - Facebook business page
  - Facebook personal profile
  - LinkedIn
  - Instagram
  - Other

## Claim Your Google Business Listing

- Go to: <https://www.google.com/business/>
- Click "Manage Now"
- Sign in or create an account
- Enter your business name
- Enter your business address
- Can hide if you're only virtual
- Specify service areas (if needed)
- Choose your business category
- Add phone number
- Add website URL
- Complete and Verify your listing
- Optimize your listing (photos, description, Q&As, etc.)

# Create Your Facebook Page

- Click on Create > Page
- Choose "Business or Brand"
- Get Started
- Name your page
- Don't forget to fill in the About, Biography, and Contact sections
- Create a great banner using Canva
- Post some content
  - 80% curated content
  - 20% original content
  - Mix between entertaining, inspiring, teaching, and sales
- Add your Services
  - Name your service
  - Set a price
  - Write a description that will make people want to buy
  - Add an image
  - Save
- Add your availability
- Add an option to book a call
  - Can use Facebook's built in feature
  - Include a link to your Calendly
- Invite your friends