Ready to jump in with both feet? Great! This checklist will help you organize your activities week by week over the first three months in business. This is a critical time to build momentum. You may not follow every checklist item exactly – some may not apply to you, or you may need to add others – but this will make sure you’re making progress.

|  |  |  |  |
| --- | --- | --- | --- |
| **Week** | **Item** | **Status** | **Notes** |
| 1 | *Business Basics* |  |  |
|  | Establish LLC and DBA |  |  |
|  | Talk with your tax preparer |  |  |
|  | Set up QuickBooks file |  |  |
|  | One-page website, domain, email |  |  |
|  | Collect all contact emails |  |  |
|  | Set up MailChimp (or similar free svc.) |  |  |
|  | Order business cards |  |  |
|  | Business Insurance |  |  |
|  | CPA meeting |  |  |
|  | Legal meeting |  |  |
|  | UFM Basecamp setup |  |  |
|  | UFM License Agreement |  |  |
|  | Set up your “sticky note” CRM |  |  |
|  |  |  |  |
| 2 | *Begin Promotion* |  |  |
|  | Email announcement to network |  |  |
|  | Personal email follow ups |  |  |
|  | Update LI profile/other social |  |  |
|  | Video: Why am I doing this? |  |  |
|  | Begin 2X/wk LinkedIn posting |  |  |
|  |  |  |  |
| 3 | *Plan Networking Events* |  |  |
|  | Find one event per week (next 10) |  |  |
|  | Define your event strategy/script (focus on RETAINER then PROJECT, not PROJECT then RETAINER) |  |  |
|  | Attend your first networking event |  |  |
|  |  |  |  |
| 4 | *Business Paperwork* |  |  |
|  | Vendor Setup (W9) |  |  |
|  | Standard Invoice |  |  |
|  | Standard MSA |  |  |
|  | Standard SOW |  |  |
|  | Vendor “alignment” meeting |  |  |
|  | Video: Your ideal customer/expertise |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 5 | *Start UFM Training* |  |  |
|  | Modules 1-3 (Presentations) |  |  |
|  | Modules 1-3 (Worksheets) |  |  |
|  | LinkedIn connection boost strategy |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 6 | *Continue UFM Training* |  |  |
|  | Modules 4-6 (Presentations) |  |  |
|  | Modules 4-6 (Worksheets) |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 7 | *Continue UFM Training* |  |  |
|  | Modules 7-9 (Presentations) |  |  |
|  | Modules 7-9 (Worksheets) |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 8 | *Continue UFM Training* |  |  |
|  | Modules 10-12 (Presentations) |  |  |
|  | Modules 10-12 (Worksheets) |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 9 | *UFM Adaptation* |  |  |
|  | Slides in each module for your market |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 10 | *UFM Client Management* |  |  |
|  | Common situations |  |  |
|  | Client care basics |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 11 | *Client Service Check-In* |  |  |
|  | Review goal: Two clients at this stage |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 12 | *Retrospective* |  |  |
|  | Review all data and progress |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |
| 13 | *Go-Forward Action Plan* |  |  |
|  | Define your objectives/targets |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Networking Event |  |  |
|  | Follow Ups |  |  |
|  |  |  |  |