If you are still employed, you have an opportunity to ease your transition to a new career and lifestyle … but you also need to find the time to do all of the work without your employer seeing a decrease in your performance. This checklist will help your organize your activities over the first 90 days with a target of one new retainer client signed at the end of that time. This will be less intense than a full-time commitment, but there is still a lot to do!

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| --- | --- | --- | --- |
| **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 |  |  |
|  | Lawyer meeting |  |  |
|  | UFM Basecamp setup |  |  |
|  | UFM License Agreement |  |  |
|  | Set up your “sticky note” CRM |  |  |
|  |  |  |  |
| 2 | *Begin Promotion* |  |  |
|  | Set up meetings with three to five trusted connections who could introduce you to new potential clients. |  |  |
|  | Prepare your one-page “pitch sheet” including your skill set, the UFM value proposition, and key organizations and clients that could make good clients (as suggestions). This will help guide networking conversations. |  |  |
|  |  |  |  |
| 3 | *Networking Meetings* |  |  |
|  | Have the first meeting, revise your one-pager. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 4 | *Business Paperwork* |  |  |
|  | Vendor Setup (W9) |  |  |
|  | Standard Invoice |  |  |
|  | Standard MSA |  |  |
|  | Standard SOW |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 5 | *Start UFM Training* |  |  |
|  | Modules 1-3 (Presentations) |  |  |
|  | Modules 1-3 (Worksheets) |  |  |
|  | LinkedIn connection boost strategy (make sure to turn off “notify network”) |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 6 | *Continue UFM Training* |  |  |
|  | Modules 4-6 (Presentations) |  |  |
|  | Modules 4-6 (Worksheets) |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 7 | *Continue UFM Training* |  |  |
|  | Modules 7-9 (Presentations) |  |  |
|  | Modules 7-9 (Worksheets) |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 8 | *Continue UFM Training* |  |  |
|  | Modules 10-12 (Presentations) |  |  |
|  | Modules 10-12 (Worksheets) |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 9 | *UFM Adaptation* |  |  |
|  | Slides in each module for your market |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 10 | *UFM Client Management* |  |  |
|  | Common situations |  |  |
|  | Client care basics |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 11 | *Client Service Check-In* |  |  |
|  | Review goal: Two clients at this stage |  |  |
|  | LinkedIn connection boost execution |  |  |
|  | Continue “stealth” networking meetings, revise your one-pager as necessary. |  |  |
|  | Contact any potential leads provided. |  |  |
|  |  |  |  |
| 12 | *Retrospective* |  |  |
|  | Review all data and progress |  |  |
|  |  |  |  |
| 13 | *Go-Forward Action Plan* |  |  |
|  | Define your objectives/targets |  |  |