If you’re an existing contractor, freelancer, or gig communicator, you have a head start on the “mechanics” of running your business. This checklist will move through those items quickly and get to the part where you begin to reframe your offerings and go-to-market strategy.

|  |  |  |  |
| --- | --- | --- | --- |
| **Week** | **Item** | **Status** | **Notes** |
| 1 | *Business Basics* |  |  |
|  | Is your LLC and DBA established and protected? |  |  |
|  | Renew your conversation with your tax preparer |  |  |
|  | Consider separate “offerings” in your QuickBooks file to track new UFM-related sales |  |  |
|  | Reboot your website – consider a simple one-page website |  |  |
|  | Do you have all of your contact emails in one place? If not, do it now. |  |  |
|  | Set up MailChimp (or similar free service) if you don’t already have one |  |  |
|  | Order new business cards with the UFM branding as a secondary element |  |  |
|  | UFM Basecamp setup |  |  |
|  | UFM License Agreement |  |  |
|  | Set up your “sticky note” CRM |  |  |
|  | Reframe your offerings to the market – for example: a “Fractional CMO” instead of a “social media expert” – elevate what you’re selling |  |  |
|  |  |  |  |
| 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 “UFM” 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 |  |  |
|  |  |  |  |