FinancialCents **Checklist for Start a Bookkeeping Business**

Task	Person Responsible	Target date to complete	Actual Date completed	Comments
Idealize Your Brand				
Choose a business name				
Create mission and value statement				
Define your target audience				
Identify your Unique Selling Proposition (USP)				
Outsource logo and branding				
Create a Business Plan				
Write an executive summary.				
Perform market analysis				
Create a detailed description of the services you'll offer				
Make financial projections				
Create marketing and sales strategy				
Outline your operational plan				
Research on legal and regulatory compliance.				
Take Bookkeeping Certification Courses				
Take a certification from recognized bookkeeping organizations.				
Choose the Structure of Your Bookkeeping Business				
Choose a structure				
Consult a legal advisor (optional)				
Register your business with the selected structure.				

Price Your Bookkeeping Services				
Conduct competitive pricing research				
Choose your pricing model (hourly, flat fee or value based pricing)				
Make a List of the Tech Stack You'll Need				
Select accounting software				
Select document management software				
Select communication tools				
Select data security software				
Select time tracking software				
Set up selected software				
Decide on Your Funding Options				
Assess your finances.				
Decide on a funding option (personal savings, small business loans, investors or bootstrapping)				
Choose Your Office Setup (Virtual or Physical)				
Choose your preferred office set up (Office or virtual)				
Buy office furniture				
Market Your Bookkeeping Business				
Search and buy your business's website domain				
Outsource website design				
Create social media accounts				
Outsource or manage your social media.				
Print business cards				
Find industry events or local business associations for networking.				

Run or outsource online advertising				
Ask satisfied clients for referrals				
Streamline Client Onboarding and Retention				
Create a client onboarding process.				
Choose an accounting CRM Software				
Create a retention strategy				