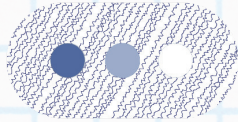


New Business Checklist

aipa.systems



Checklist

Hi, so glad you're here.

Starting a new or additional business is a process that involves many baby steps. From personal experience, any one of those steps can become a block that holds you back months, even years.

That's why I put together this simple checklist to help you map out what the steps are and where you might be getting stuck.

About me

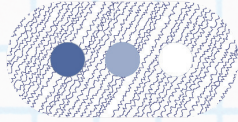


I'm Jess, one of only a handful of HighLevel Certified Admins in Australia.

I help local businesses set up systems that run their businesses as much as possible on auto-pilot. For example, I design websites that are connected to a CRM that automatically follows up enquiries by SMS. I create custom built voice agents for businesses that are unable to get to all their phone calls. I set up database reactivation campaigns that squeeze more value out of existing contacts. And, because of my design background I help with logos, social media templates and branding.



I love supporting people to get new businesses off the ground because I believe that everyone needs more than one income stream.



Checklist

Step 1: Make it Official

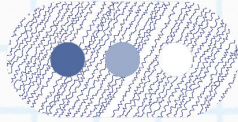
- ☐ Apply for an ABN
- ☐ Choose/register your business structure
- ☐ Register your business name if you're trading under a name other than your own
- ☐ Check whether you need to register for GST
- ☐ Check whether you need any industry-specific licences or permits
- ☐ Set up a business bank account
- ☐ Set up bookkeeping/accounting software

Notes:

ABN can be applied for at <https://www.abr.gov.au/>

Information on registering a business name can be found here:
<https://www.asic.gov.au/for-business-and-companies/business-names/register-a-business-name/how-to-register-a-business-name-with-asic>

Bookkeeping software to consider: Xero or Hnry (sole traders)



Checklist

Step 2: Get your digital foundations sorted

- ☐ Choose and purchase your domain name
- ☐ Set up your business email address
- ☐ Create an email signature
- ☐ Set up your business phone number
- ☐ Create your logo
- ☐ Choose your brand colours and fonts
- ☐ Create your basic Canva brand kit

Notes:

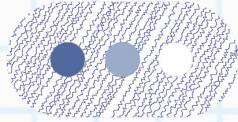
Check out if your domain is available at:

<https://www.godaddy.com/>

Business email accounts can be created through Microsoft 365, Google Workspace or Fastmail (local Australian provider)

Business phone numbers can be purchased at:

<https://www.twilio.com/en-us>



Checklist

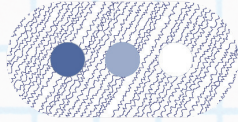
Step 3: Start building your online presence

- ☐ Build your website
- ☐ Connect your domain
- ☐ Make sure your website works properly on mobile
- ☐ Add your contact/enquiry form
- ☐ Add your services/products
- ☐ Add your About page
- ☐ Add your contact details
- ☐ Add privacy policy/terms/required website information

Notes:

Research different website builder platforms - they all have different prices, different ease of use and different features.

Some platforms to look into are: Squarespace, Wordpress, Loveable, Replit and Shopify.



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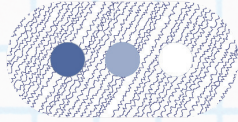
Step 4: Set up your business systems

- ☐ Choose your CRM
- ☐ Import/add your contacts
- ☐ Create your sales pipeline
- ☐ Set up your calendar/booking system
- ☐ Connect your website to your CRM
- ☐ Set up lead notifications
- ☐ Create your basic follow-up emails/SMS
- ☐ Set up appointment confirmations/reminders
- ☐ Set up a missed-call text-back
- ☐ Connect the tools you use so they talk to each other

Notes:

You don't need to automate everything on day one.

Start with the things that happen repeatedly and are easy to forget.



Checklist

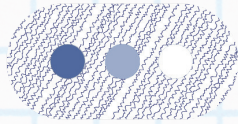
Step 5: Set up your customer-facing channels

- ☐ Create your Facebook business page
- ☐ Create your Instagram/TikTok/LinkedIn business presence as relevant
- ☐ Make sure your business name, website and contact details are consistent
- ☐ Add your website and contact information to your profiles
- ☐ Set up Google Business Profile
- ☐ Decide how customers will contact you – phone, email, form, DM or booking link

Notes:

Google Business Profile will take a while to set up.

Use Canva to create consistent branding across your socials.



Checklist

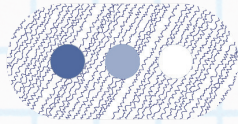
Step 6: Get ready to take money

- ☐ Choose your payment method/provider
- ☐ Set up invoices/receipts
- ☐ Decide how you'll accept card payments
- ☐ Set your pricing
- ☐ Create your basic terms and conditions
- ☐ Work out your cancellation/refund policy
- ☐ Test the payment process

Notes:

Some CRMs and accounting software programs have payment gateway and invoicing features. You may also be able to create invoices directly via your business bank account (Wise accounts offer this).

Take a look around and see what will work for you with the least amount of fuss.



Checklist

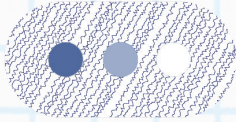
Step 7: Boring but important

- ☐ Use a password manager
- ☐ Turn on two-factor authentication
- ☐ Keep business accounts in the business owner's name/email, not a contractor's
- ☐ Keep a record of domains and subscriptions
- ☐ Keep backups of important files
- ☐ Make sure you know who owns your website, domain and social accounts
- ☐ Keep your business email separate from your personal email

Notes:

Some password managers you might want to look into are 1Password, Dashlane and Lastpass.

Using a small address book with alphabetical tabs is a simple lo-fi way to keep track of passwords until you find a more secure solution. Just keep it in a safe place!



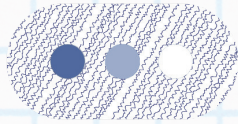
Checklist

Step 8: Before you launch

- ☐ Visit your website on your phone
- ☐ Click every important link
- ☐ Submit your enquiry form
- ☐ Check the CRM receives the lead
- ☐ Check your notification arrives
- ☐ Test your booking calendar
- ☐ Test your payment process
- ☐ Send an email to your business address
- ☐ Call your business number
- ☐ Google your business name



You're ready to launch!!



Checklist

Help is available

You don't have to figure out all of this yourself.

aipa.systems New Business Setup gives you two hours of hands-on help to get the digital foundations of your business sorted.

Choose what you need help with (domain, email, website, branding, CRM and more) and we'll work through it together.

We can jump on a Zoom and knock out as many things as possible together in 2 hours. Sometimes you just need a bit of body doubling and someone to ask questions to as you go.

[See the New Business Set Up Menu here.](#)

If there's just one item you're stuck on that won't take 2 hours, please get in touch. I offer an hourly consulting rate for small jobs and would be happy to help.

Here's my number:

+61 468 068 884

