

# Checklist for Starting a Business

by Alex Raymond, RD, LD, CEDRD  
alex@couragetonourish.com



There's a lot of steps when starting a business. It's a lot to remember!! Use this checklist to make sure you completed all the necessary steps to make your business successful!



## Logistical

- Forming your LLC
  - Use either an accountant or lawyer
- City/County guidelines for registering your business
  - Ask a lawyer or accountant if there is anything special you need to do to register your business with the state, county or city where you're business is located
- Find accountant
  - Ask accountant about options for paying yourself/how to be taxed
- Consult with a lawyer (if needed)
- Bookkeeper
- Business bank account
- Business credit card
- Payroll service
  - ADP for example
- Office space (or virtual office)
  - Loopnet.com is great for searching for offices
- Professional email (through g-suite)
- For Partnership: form an operating agreement
  - Ask lawyer
- Fax number (we use SRFax)
- Phone number (google voice)
- Consider setting up an IRA or 401K for yourself
  - Would need to be a W2 employee

## For Clients

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- EHR (we use Simple Practice)
    - Others are kalix, healthie, office ally
  - Registration forms
  - Initial intake
  - Practice policies (include a late cancelation policy and credit card policy)
  - Telehealth authorization
  - Notice of privacy practices
  - Release of information
  - Set up billing\*
  - Welcome emails\*
  - Reminder emails\*
    - \*Usually the above 3 you are able to set up on your EMR platform
  - Create handouts (if needed)
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## Marketing/Web presence

- Establishing an “ideal client” and your business values
- Creating an online presence
  - Website
  - Google My Business
  - HealthProfs
  - Social media (facebook, twitter, instagram, tiktok)
  - Get google (or yelp) reviews
- Website minimum recommended pages
  - Homepage
  - About us/bio page
  - Services page
  - Other ideas: resources page, freebies page, blog, testimonials
- Letterhead

## Marketing/Web presence cont.

- Practice opening announcements
  - Therapists in the area
  - Dietitian Colleagues
  - Listservs/Facebook groups
  - Call (or email) physician offices
- Join Facebook groups
  - INSPIRDtoSEEK
  - HAES Therapists and Nutritionists
- Create spreadsheet of marketing contacts
  - Therapists
  - Psychiatrists
  - Pediatricians/Physicians
  - OB GYN
  - Treatment Center Reps
  - Guidance counselors
- Add business to treatment finders
  - ANAD
  - NEDA
  - HAES Professionals
- Business cards
  - Vistaprint
- Logo