

Personal Readiness To Start A Business - - A Self-Assessment Checklist

**Are You Ready to Start a Business - - Use
This Self-Assessment Checklist and Find
Out Before You Waste Your Time and Money!**



**Over 300 tactics and strategies
to be considered before starting
your new business**

**Retail Price: \$19.95
Retail Value: ∞**

The

Nitty Gritty, Down N' Dirty, Savvy Strategies®

**PERSONAL READINESS TO
START A BUSINESS CHECKLIST**

(A Self-Assessment Checklist)

**Over 300 tactics & strategies
to be considered when
starting a new business**

By

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INTRODUCTION

The **Personal Readiness To Start A Business Checklist** will help you answer the question "Am I prepared to be a business owner?". The Checklist is a self-assessment tool that is designed to help you start a business with the primary focus on determining if you are truly ready to start a business by examining a range of topics that include family considerations, financial resources, personal and professional support systems as well as many other vital subjects. The evaluation process contained on the following pages is simple, yet thorough, and can point you in the right direction if conducted in a careful, thoughtful manner.

Starting a business is an exciting endeavor and is typically accompanied by very high expectations. However, it is usually undertaken with a lot of anxiety and trepidation as well. According to some sources, approximately 4 out of 5 businesses fail within the first three years of operation, and then an additional 4 out of 5 of the remaining businesses fail during the next few years of operation. How does an entrepreneur triumph over these seemingly overwhelming odds and avoid being included in these gruesome statistics?

Based upon many years of providing Business Management Consulting Services along with successfully managing several businesses, there are, I believe, several keys to success. The first is the desire, belief, and expectancy that you can make your business successful. This desire generally requires an intense commitment and many hours of hard work which often involves forfeiting the pleasures of family events, hobbies, sports, TV, online gaming, etc. Hopefully this sacrifice will be short lived as your business becomes more successful. The second key to success is to become educated regarding the process of starting a new business. This includes understanding your marketplace, financial management techniques, and operational strategies as well as myriad laws, tax implications, and business structure.

While many of the topics and action items discussed herein can be applied in most any type of business, all of them do not apply in all business environments. Some may be appropriate in a retail environment, some apply to Internet based businesses, others apply to manufacturing businesses, and some of them apply only in very specific business situations. Some action items are free, many have minimal cost, and others may require a substantial investment. Some require only an attitudinal change while others may require an investment in acquiring additional knowledge. However, all of these topics merit your consideration as you begin to develop a strategy for launching your new venture.

Helpful Hint: The assessment process is quite thorough and can require a considerable amount of time. However, it is important to emphasize that it is not necessary to complete the assessment in one sitting, in one day, in one week or even in one month. You can't "do it all" at one time. You may want to consider a methodical process whereby you conduct the assessment using a different module each day or each week. Remember, this checklist is a reference manual that can be utilized time and time again on an as needed basis on your personal timetable.

Each module has a simple process that allows you to take an inventory of all the

factors and actions necessary for success. This can be done quickly and easily and will rapidly identify areas that will require you to seek additional information or to conduct more research. Beside each question, factor, or action item is a space for making notes that will help facilitate the evaluation process and serve as a reminder to follow up on certain items. This is a simple personal management process to help keep you focused.

In all areas where you are lacking information or business expertise, seek out the counsel of Attorneys, Bankers, Certified Public Accountants, or Consultants with specific expertise. Some government agencies in your local area may also offer free information or counseling services. This process will no doubt consume a fair amount of time and generate much discussion between yourself and knowledgeable individuals. Take the time necessary to fully explore the knowledge that exists within this group of experts. This is a time to establish relationships that may be helpful if you "hit a few bumps in the road" during either the startup or operational phases.

Additionally, there is a section in this document that offers **Alternatives to Starting a New Business**. If you have a great idea, but for various reasons such as timing, financial, family, or professional obligations you decide not to move forward with your venture at this time, perhaps one of these alternatives may be a better choice.

Before you invest all your savings, tap your retirement account, forego the allocation of money into a college fund for your children, take money from your home equity line of credit, sell your investment portfolio, give up a vacation home, or quit your job, please carefully and honestly consider all the topics of discussion in this checklist. Most individuals who have started a business have never completed a self-assessment process, which is probably the reason for the high failure rates of new businesses. You owe it to yourself to complete this assessment process.

If, after taking this assessment you believe you are truly ready to start a business then consider some of the following options:

Start-up a Small Business Checklist - Implementation: Am I prepared to be a business owner is the most important question that must be asked? The "Implementation" Start A Business Checklist is much more extensive than the "Personal Readiness" Checklist. This Checklist will help you minimize mistakes and prepare you for a successful launch of your business. The same 300+ questions and action items are asked but included is a comprehensive format and process to help you manage priorities, due dates, and the resources required to launch your business. Additionally, there are Summary Charts and Tables showing the various Business Entity Types, a discussion of The 13 Worst Business Start-Up Mistakes, and a chart for Viable Alternatives to Starting a New Business. Also included is the complete Business Planning Guide (described below) that will guide you through the process of writing your business plan. If you purchase this Checklist, then **DO NOT** buy the "How To Write A Business Plan Guide" as it is included. This checklist is based on the author's experience with hundreds of small businesses. If you are serious about launching your business, this is the checklist for you.

The [How To Write A Business Plan Guide](#) is designed to provide a process for creating several variations of a business plan with each variation used for a specific purpose and for a specific audience. This guide features a One Page Executive Summary Format, a Simplified Model for a Business Plan, guidance for Creating a Comprehensive Business Plan, instructions for How to Use the Business Plan Guide, a discussion of The Business Plan creation Process, helpful Tips for Writing the Business Plan, a sample Business Plan Outline, a Business Plan Outline Description, 2 sample Cash Flow Statements that are downloadable for your business plan, 22 Market Research Sources, and 27 possible Funding Options. A comprehensive business plan that is well-written, based upon market research, and is supported by a conservative and thoughtful Cash Flow Statement will provide a structure for helping to make your business successful. This guide is based on the author's experience with hundreds of small businesses.

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You have made an investment by purchasing this document. Now conduct the assessment!

GOOD LUCK WITH YOUR VENTURE!

Comments, Critique, Recommendations, or Submittals:

Please direct any comments, critique, or recommendations to Jim O'Donnell of Jaguar Management Consulting Group, Inc. at the address on the inside cover page or via email. Your comments and suggestions are most welcome, will be carefully reviewed, and will be included in the next published edition. Your critique will help improve this self-assessment checklist for the benefit of all entrepreneurs and start-up businesses.

To review other self-assessment checklists for bringing your company to the next level of growth and profitability, visit WWW.Checklists4Business.com or see Module XXIII.

The information contained herein does not constitute legal, professional, or commercial advice. The author, publisher, or sponsors of this self-assessment checklist/workbook are not engaged in rendering, by either the sale or distribution of this publication, legal, consulting, accounting, or other professional services. Users of this checklist/workbook assume full responsibility for all decisions made as a result of using this self-assessment process. The reader is encouraged to employ the services of a competent professional in all such matters.

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TABLE OF CONTENTS

I.	Am I Ready for Business Ownership 36 Topics to be discussed and evaluated
II.	Important Business Considerations 18 Topics to be discussed and evaluated
III.	Professional Considerations 9 Topics to be discussed and evaluated
IV	Understanding Your Personal Financial Risks 16 Topics to be discussed and evaluated
V.	Family Conversations You Must Have 7 Topics to be discussed and evaluated
VI.	Improving Your Chances For Success 24 Topics to be discussed and evaluated
VII.	Understanding the Cash requirements 23 Topics to be discussed and evaluated
VIII.	Return On investment 6 Topics to be discussed and evaluated
IX.	Where to Locate Your Business 24 Topics to be discussed and evaluated
X.	Should You Buy an Existing Business 26 Topics to be discussed and evaluated
XI.	Sharing Ownership of Your Business 8 Topics to be discussed and evaluated
XII.	Purchasing and Inventory Options 19 Topics to be discussed and evaluated
XIII.	Pricing Your Products and Services 9 Topics to be discussed and evaluated
XIV.	Marketing Your Products and Services. 12 Topics to be discussed and evaluated
XV.	Selecting and Training Personnel. 14 Topics to be discussed and evaluated
XVI.	Important Management Decisions 11 Topics to be discussed and evaluated
XVII.	Laws and Regulations 10 Topics to be discussed and evaluated
XVIII.	Tax and Insurance Requirements 10 Topics to be discussed and evaluated
XIX.	Leaving the Corporation Behind 13 Topics to be discussed and evaluated

Table of Contents continued . . .

- XX. Keeping Up to Date**
9 Topics to be discussed and evaluated
- XXI. Protecting Your Company's Most Valuable Asset – Yourself**
32 Topics to be discussed and evaluated
- XXII. Viable Alternatives to Starting a New Business**
- XXIII. Other Checklists Currently Available.**
- XXIV. Bio – Jim O'Donnell**

I. AM I READY FOR BUSINESS OWNERSHIP: *(Partial)*



Am I prepared to be a business owner? Answering this very important question honestly and thoroughly will help prepare you for the challenge ahead, as well as make you aware of potential risks. There are numerous factors to consider, including your personal characteristics, business and/or technical skills, financial readiness, and your support system. Everything does not need to be perfect to successfully launch your business but knowing the answers to the questions throughout this checklist will increase your odds for success.

No.	TOPICS TO BE DISCUSSED AND EVALUATED:	STATUS		NOTES & ACTION ITEMS
		YES	NO	
1.	Have you identified and prioritized your personal goals in writing?	<input type="checkbox"/>	<input type="checkbox"/>	
2.	Have you identified and prioritized your professional goals in writing?	<input type="checkbox"/>	<input type="checkbox"/>	
3.	Do you have a written list of your personal strengths and weaknesses, and have you thoroughly evaluated them?	<input type="checkbox"/>	<input type="checkbox"/>	
4.	Do you have a good understanding of what is motivating you to become an entrepreneur?	<input type="checkbox"/>	<input type="checkbox"/>	
5.	Are you physically ready for the challenge of starting a new business?	<input type="checkbox"/>	<input type="checkbox"/>	
7.	Do you have a high energy level that will sustain you for the longer term?	<input type="checkbox"/>	<input type="checkbox"/>	
15.		<input type="checkbox"/>	<input type="checkbox"/>	
22.		<input type="checkbox"/>	<input type="checkbox"/>	
36.		<input type="checkbox"/>	<input type="checkbox"/>	



A Wise Old Owl Once Said . . .

"To know thyself is the beginning of wisdom."

~ Socrates, Greek Philosopher

Considered to the founder of Western philosophy

II. IMPORTANT BUSINESS CONSIDERATIONS: *(Partial)*



It is important to understand how your products or services compare to other offerings in the marketplace, what makes them unique, or if there is even a market for them. The purpose of this module is to jump-start your thinking about a number of high-level business considerations as you begin to formulate your plans. More detailed questions about marketing, finance and organizational structure will follow in subsequent modules of this checklist.

No.	TOPICS TO BE DISCUSSED AND EVALUATED:	STATUS		NOTES & ACTION ITEMS
		YES	NO	
1.	Will your product or service provide an unfulfilled need in the marketplace?	<input type="checkbox"/>	<input type="checkbox"/>	
2.	Will your product or service improve the efficiency or functionality of other offerings currently in the marketplace?	<input type="checkbox"/>	<input type="checkbox"/>	
3.	Will your product or service cost less than other offerings currently in the marketplace?	<input type="checkbox"/>	<input type="checkbox"/>	
4.	Will your product or service provide a higher Return-On-Investment (ROI) than other offerings currently in the marketplace?	<input type="checkbox"/>	<input type="checkbox"/>	
5.	Have you identified what your product/service uniquely provides that other offerings do not provide?	<input type="checkbox"/>	<input type="checkbox"/>	
6.	Have you conducted a thorough marketing study to help understand who your customers are, why they buy, at what price, when they buy, and why they would buy from your business?	<input type="checkbox"/>	<input type="checkbox"/>	
7.	Have you clearly identified your market niche?	<input type="checkbox"/>	<input type="checkbox"/>	
8.	Have you studied your competition to understand why they are successful?	<input type="checkbox"/>	<input type="checkbox"/>	
9.	Have you studied your competition to understand how you will be able to effectively compete with them?	<input type="checkbox"/>	<input type="checkbox"/>	
10.	Have you prepared pro-forma financial statements including a monthly cash flow statement for Year 1 and quarterly statements for Years 2 and 3?	<input type="checkbox"/>	<input type="checkbox"/>	
18.		<input type="checkbox"/>	<input type="checkbox"/>	

III. UNDERSTANDING YOUR PERSONAL FINANCIAL RISKS: *(Partial)*



Unless you are independently wealthy, starting a business will require an investment of your personal funds. No bank will give you a loan for the full amount needed to start a business and support it until the business becomes profitable. Banks have varying requirements for the amount they will lend based upon their confidence in your ability to make the business successful, but more importantly on your ability to pay-back the loan. Your personal solvency is a primary factor in this lending decision.

No.	TOPICS TO BE DISCUSSED AND EVALUATED:	STATUS		NOTES &
		YES	NO	ACTION ITEMS
1.	Have you accurately assessed your current financial situation?	<input type="checkbox"/>	<input type="checkbox"/>	
2.	Have you taken an inventory of your personal assets?	<input type="checkbox"/>	<input type="checkbox"/>	
3.	Have you received a recent copy of your credit report and what does it say about you and your ability to manage money?	<input type="checkbox"/>	<input type="checkbox"/>	
4.		<input type="checkbox"/>	<input type="checkbox"/>	
5.	Have you constructed a personal budget?	<input type="checkbox"/>	<input type="checkbox"/>	
6.	Can you cope with financial uncertainty, or do you need the security of a weekly paycheck?	<input type="checkbox"/>	<input type="checkbox"/>	
7.		<input type="checkbox"/>	<input type="checkbox"/>	
8.		<input type="checkbox"/>	<input type="checkbox"/>	
9.		<input type="checkbox"/>	<input type="checkbox"/>	
10.	Do you need to use the funds in your investment portfolio and are you willing to risk these funds?	<input type="checkbox"/>	<input type="checkbox"/>	
11.	Do you need to use the equity in your house and are you willing to risk this asset?	<input type="checkbox"/>	<input type="checkbox"/>	
12.		<input type="checkbox"/>	<input type="checkbox"/>	
13.	Will you be using your credit cards to help fund the business?	<input type="checkbox"/>	<input type="checkbox"/>	
16.		<input type="checkbox"/>	<input type="checkbox"/>	

IV. FAMILY CONVERSATIONS YOU MUST HAVE: *(Partial)*



Starting a business is not only about you, but about your family as well. Importantly, every family member needs to understand how starting a business will affect them, not only from a financial perspective, but from the perspective of the time required to make the business successful. This means you may miss a lot of important time with your family. Do not delay this very important discussion.

No.	TOPICS TO BE DISCUSSED AND EVALUATED:	STATUS		NOTES & ACTION ITEMS
		YES	NO	
1.	Do your family members understand the personal sacrifices required from each of them in terms of time and financial commitments to help make this business successful?			
2.	Are you/they willing to live on less money until the business prospers?			
3.				
4.	Do you have a working spouse or significant other to ease the initial financial burden?			
5.	Are there any family members who will commit to helping by working in the business?			
6.				
7.				

V. IMPROVING YOUR CHANCES FOR SUCCESS: *(Partial)*



According to the U.S. Bureau of Labor Statistics (BLS), data shows that approximately 20% of new businesses fail during the first two years of operation, 45% during the first five years, and 65% during the first 10 years. Only 25% of new businesses make it to 15 years or more. Let's explore a few questions that will help improve your chances for success and defy these statistics.

No.	TOPICS TO BE DISCUSSED AND EVALUATED:	STATUS		NOTES & ACTION ITEMS
		YES	NO	
1.	Have you previously worked in a business similar to the one you are starting? For how long?	<input type="checkbox"/>	<input type="checkbox"/>	
2.	Do you have special technical skills, such as those needed by an engineer, business consultant, electrician, or computer technician which may be required to be successful in your type of business?	<input type="checkbox"/>	<input type="checkbox"/>	
3.	Do you understand the critical and/or unique components that make this type of business successful?	<input type="checkbox"/>	<input type="checkbox"/>	
4.	Do you understand the basic skills required for being successful in this type of business?	<input type="checkbox"/>	<input type="checkbox"/>	
5.	Do you possess - - all, most, or some of these skills?	<input type="checkbox"/>	<input type="checkbox"/>	
6.	Have you considered working for another company for a short time to gain more experience and specialized expertise?	<input type="checkbox"/>	<input type="checkbox"/>	
7.	Do you have friends/business associates who could provide some of the required special skills?	<input type="checkbox"/>	<input type="checkbox"/>	
8.		<input type="checkbox"/>	<input type="checkbox"/>	
9.		<input type="checkbox"/>	<input type="checkbox"/>	
15.		<input type="checkbox"/>	<input type="checkbox"/>	
24.		<input type="checkbox"/>	<input type="checkbox"/>	

VI. UNDERSTANDING THE CASH REQUIREMENTS: *(Partial)*



Every business is unique and has its own cash requirements. Starting a new business is exciting and it is easy to become overly optimistic. Expenses are usually higher than expected and revenue may be slower than forecasted. Being realistic, exploring all funding options, having a good financial plan, and using a Cash Flow Statement to determine the cash required during the startup stage and first year of operation are essential steps to help ensure success.

No. TOPICS TO BE DISCUSSED AND EVALUATED:

1. Have you calculated the revenue you can reasonably expect to generate in the first 6 months?
2. Have you calculated the revenue you can reasonably expect to generate in the first year?
3. Have you calculated the revenue you can reasonably expect to generate in the second year?
5. Have you calculated the effect on profitability if sales meet only "X" % of your planned forecast?
7. Is your salary included in these expenses?
10. Does the net income you expect to achieve make this venture worthwhile?
- 24.

STATUS		NOTES & ACTION ITEMS
YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	

A Story Without A Guarantee:

A husband-and-wife team wanted my help with starting an appliance parts business that would sell parts to appliance service technicians. The husband had 20+ years of experience working in several appliance parts stores in different areas of the country. We talked about their goals, writing a brief Business Plan, and the importance of creating a Cash Flow Statement. Although Bill had no experience writing a Business Plan, he made good progress on his first draft. However, the revenue forecast was highly exaggerated, and the profit margins were astronomical. We cut the revenue forecast in half and Bill continued working on his plan. At the next meeting I again cut his revenue forecast in half. They were not happy about this, and Bill's wife refused to meet with me again. The next meeting showed much progress on the Business Plan, yet I cut the revenue forecast by another 25%. Finally, the plan was finished, was more realistic, and we submitted the plan to seven local area banks. One of the banks loaned Bill the money and he opened the business as planned. Even after numerous calls and letters to prospects and many personal visits with the appliance technicians, revenue was far below what had been forecasted. Bill had used all the funds and had to close the business. Although he did just about everything correctly, it seemed that he didn't have enough differentiation with his parts and customer service to break the longstanding relationships between the service technicians and their current suppliers. Even when you have the right expertise, work hard, and create a good business plan, you can't foresee all the pitfalls. There are no guarantees!



VII.MARKETING YOUR PRODUCTS AND SERVICES: *(Partial)*



There are many hundreds of marketing tactics that can help achieve the revenue that will make your business successful but are far too numerous to examine here. The objective of this module is to provide a high-level overview of some of the key strategies for marketing your products or services. Deciding on an overall strategy will help you create a revenue forecast along with identifying the costs to implement these strategies. This will help to complete your business plan and financial statements.

No.	TOPICS TO BE DISCUSSED AND EVALUATED:	STATUS		NOTES & ACTION ITEMS
		YES	NO	
1.	Do you understand your customers persona and why they will purchase the types of products and services you are offering? Is it price, quality, distinctive styling, time saving, better functionality, ego satisfaction, other?			
2.	Have you studied both the direct and indirect marketing strategies being used by your competitors?			
3.	Do you understand why these methods are/are not successful?			
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				

VIII. LEAVING THE CORPORATION BEHIND: *(Partial)*



Leaving your current employer to start a business is an exciting decision. Perhaps your employer has several resources you can take advantage of while you are preparing to start your business. Now is the time to evaluate the benefits you can take with you such as health and dental plans as well as determine other lump sum distributions you're entitled to. This is also a good time to take advantage of additional training opportunities and build your professional network.

No.	TOPICS TO BE DISCUSSED AND EVALUATED:	STATUS		NOTES & ACTION ITEMS
		YES	NO	
1.	Have you determined which benefit plans you can take with you?	<input type="checkbox"/>	<input type="checkbox"/>	
2.	Can you submit any medical expenses or take any exams now?	<input type="checkbox"/>	<input type="checkbox"/>	
3.		<input type="checkbox"/>	<input type="checkbox"/>	
4.		<input type="checkbox"/>	<input type="checkbox"/>	
5.		<input type="checkbox"/>	<input type="checkbox"/>	
6.		<input type="checkbox"/>	<input type="checkbox"/>	
7.		<input type="checkbox"/>	<input type="checkbox"/>	
8.		<input type="checkbox"/>	<input type="checkbox"/>	
9.		<input type="checkbox"/>	<input type="checkbox"/>	
10.		<input type="checkbox"/>	<input type="checkbox"/>	
11.		<input type="checkbox"/>	<input type="checkbox"/>	
12.		<input type="checkbox"/>	<input type="checkbox"/>	
13.	Is it possible that your company could be your first customer?	<input type="checkbox"/>	<input type="checkbox"/>	

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Other Business Checklists - - Descriptions

Retail Store Management and Marketing Checklist: Retail storeowners and managers can now conduct a thorough "Self-Assessment" of where their operations stand today, and then, based upon the results of this analysis, implement sound business strategies for accelerating growth, reducing unnecessary waste, and improving their store's profitability. This unique management tool features over 1,000 tactics, strategies, and action items for evaluating twenty-five different operational categories ranging from store image to customer service to marketing. The Checklist includes a simple process for helping you identify the highest priority tasks along with assigning responsibilities and due dates for completing each action item. This process is your personal management tool for tracking progress. Bring your retail store to the next level of growth and profitability by using this management Checklist today. To see how your store can benefit from this Checklist, visit [**Retail Store Management and Marketing Checklist**](#)

Restaurant Management and Marketing Checklist: Restaurant owners and managers can now conduct a thorough "Self-Assessment" of where their operations stand today, and then, based upon the results of this analysis, implement sound business strategies for accelerating growth, reducing unnecessary waste, and improving their restaurant's profitability. This unique management tool features over 1,425 tactics, strategies, and action items for evaluating thirty-two different operational categories ranging from restaurant image to customer service to marketing. The Checklist includes a simple process to help you identify the highest priority tasks along with assigning responsibilities and due dates for completing each action item. This process is your personal management tool for tracking progress. Bring your restaurant to the next level of growth and profitability by using this management Checklist today. To see how your restaurant can benefit from this Checklist, visit [**Restaurant Management and Marketing Checklist**](#)

Employee Benefits (Employee Motivation) Checklist: Motivating employees and keeping them motivated is one of the most difficult, and most rewarding, activities of a senior manager. Even in the most difficult of economic times, we know employees have choices regarding the company, and the culture, in which they prefer to work. This checklist is designed to be a self-assessment management tool for conducting an evaluation of your company's employee benefits and motivational strategies. Offering over 500 ideas, this guide is designed for the serious management team that truly wants to evolve their business to the next level of growth and profitability via the strategy of employee satisfaction. To see some ideas for what your company could do to improve employee satisfaction, visit [**Employee Benefits \(Employee Motivation\) Checklist**](#)

Business Anniversary and Celebrations Checklist: This checklist has over 400 ideas to help your business enjoy its important milestones and celebrate its employees and customers. This Checklist features many interesting marketing and fun activities for restaurants, retail stores, child themed stores and numerous ideas for all types of businesses. This is a great way to build employee morale and connect with your customers - - show them how much you appreciate them. Have fun at your celebration with some of the ideas featured in the [**Business Anniversary and Celebrations Checklist**](#)

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Business Plan Review: Would you benefit from having an experienced businessperson review your business plan before you present the plan to potential investors or bank loan officers? Once your business plan has been written, I will spend up to two hours reviewing

your business plan or loan proposal for completeness, viability, and to see if it “makes good business sense”. In other words, let’s catch any mistakes now! This review does not include rewriting any part of the plan, conducting market research, modifying the Cash Flow Statement, or commenting on any legalities, but I will review the assumptions, the numbers, the marketing plan, and the overall presentation as well as provide feedback on my general impressions. I’ll give constructive feedback with some brief written comments, ask some questions of clarification, and provide helpful suggestions for improving your Business Plan. Take advantage of this value-priced service by visiting [Business Plan Review](#)

Business Documents Review: Would your business benefit from having an experienced businessperson review your strategic plan, marketing plan, Search Engine Optimization strategy, Search Engine Marketing plan, business plan, expansion and growth strategy, Cash Flow Statement, or any other business initiative? Do your plans need validation or tweaking?, Do you need help identifying areas of improvement or selecting a better option? Are you currently getting the results you want? If not, perhaps having an experienced set of eyes “take a closer look” will provide a new perspective. Our Business Documents Review Services are tailored to fit your needs and budget. For more info visit [Business Documents Review](#)

Custom Checklists and Guides: If you like the content, organization, and format of my checklists, then I can customize an existing checklist (or create a completely new Checklist) for your business or industry. For more info visit [Business Documents Review](#)

Checklist for Choosing an Assisted Living Facility for Yourself or a Loved One: This Checklist features over 650 items to be considered when making this critical family decision. If you have a family member, friend, relative, neighbor, or business associate considering an Assisted Living Facility lifestyle, or a senior living home, for themselves or a family member, this checklist will make the decision-making process much easier. This checklist is based on our family’s personal experience with selecting an ALF for my Mother-in-law, handling several of her medical emergencies at the ALF, and working through several ALF organizational changes. Select the “right” Assisted living Facility for your loved one by visiting [Checklist for Selecting an Assisted Living Facility](#)

