Startup Checklist and Project Plan





Marty Koenig
Founder and CEO of CxO To Go

Startup Checklist and Project Plan

Written by Marty Koenig

Hello and thank you for purchasing my Startup Checklist and Project Plan! Don't let things fall through the cracks. You get 196 items in the right sequence, so you can build a successful startup. It doesn't matter if you're starting up in software, gadgets, products....whatever.

I've spent a lot of time preparing this for my clients. They pay me \$1,699 to build one of these just for them. Now you get benefit. Get ready for the incredible detail. It's all in here. I hope you enjoy it.

If you like this, then you'll love the tool where you can customize everything yourself. See this:

I will provide the detailed MS Project plan .mpp, .xls and .xml you can customize for your startup. When you order that, you get my free download "Actions Tracking Sheet" to once and for all get your startup organized. CLICK HERE:

http://money.cxotogo.com/startupplan

If you enjoy this roadmap, be sure to check out my other Fiverr Gigs fiverr.com/bizgrowthcoach. Especially my Kickstarter planning guide here: http://bit.ly/La0IQg. They're all extremely helpful in crowdfunding, startups, entrepreneurship, business funding, technology, and business growth.



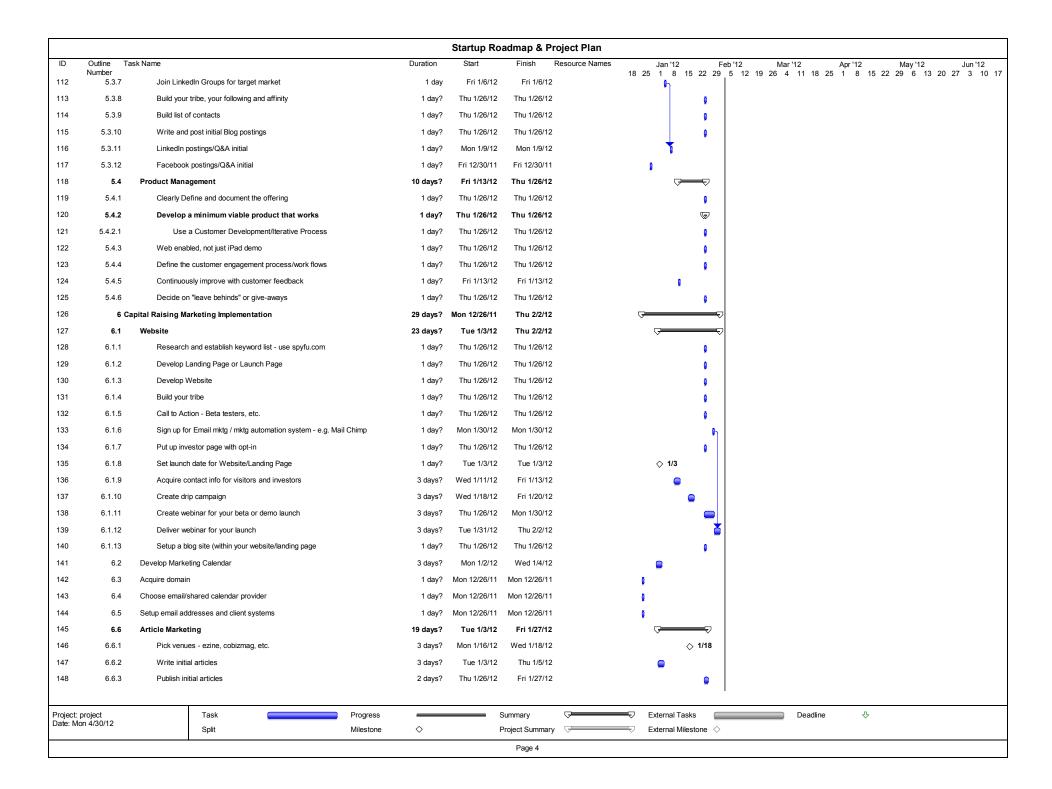
- Marty Koenig CxO To Go



				Startup Ro	admap & Project Plan	-
ID		Task Name	Duration	Start	Finish Resource Names	Jan '12 Feb '12 Mar '12 Apr '12 May '12 Jun '12
1	Number 1	Legal Setup	12 days?	Mon 1/23/12	Tue 2/7/12	18 25 1 8 15 22 29 5 12 19 26 4 11 18 25 1 8 15 22 29 6 13 20 27 3 10 17
2	1.1	LLC, S-Corp, C-Corp, Other	3 days?	Thu 1/26/12	Mon 1/30/12	♦ 1/30
3	1.2	? Choose a Company Name	1 day?	Thu 1/26/12	Thu 1/26/12	6
4	1.3	3 Trademark Search	1 day?	Thu 1/26/12	Thu 1/26/12	
5	1.4	Pick physical address of company	1 day?	Thu 1/26/12	Thu 1/26/12	0-
6	1.5	Registration of company Colorado SOS	6 days?	Tue 1/31/12	Tue 2/7/12	
7	1.6	DBA if needed	1 day?	Thu 1/26/12	Thu 1/26/12	o T
8	1.7	All initial, minimal legal documents - LLC	5 days?	Mon 1/23/12	Fri 1/27/12	♥ ♥
9	1.7.1	Articles of Organization	4 days?	Mon 1/23/12	Thu 1/26/12	⊽ ₹
10	1.7.1.1	Pick Member or Manager Managed	1 day?	Thu 1/26/12	Thu 1/26/12	g
11	1.7.1.2	Select registrant	1 day	Mon 1/23/12	Mon 1/23/12	
12	1.7.2	2 Tax Setup (Partnership, S-Corp) Decision	3 days	Wed 1/25/12	Fri 1/27/12	<u> </u>
13	1.7.3	Apply for EIN	1 day?	Thu 1/26/12	Thu 1/26/12	•
14	1.7.4	Form 2553 federal tax form for S-Corp or C-Corp	1 day?	Thu 1/26/12	Thu 1/26/12	9 7
15	1.7.5	Local business license if required	1 day?	Fri 1/27/12	Fri 1/27/12	₹
16	1.7.6	Setup state-level register for each state you do business in	1 day?	Thu 1/26/12	Thu 1/26/12	9
17	1.8	Capital Compliance	1 day?	Thu 1/26/12	Thu 1/26/12	₩
18	1.8.1	Registration for appropriate capital raising method, Reg D, etc.	1 day?	Thu 1/26/12	Thu 1/26/12	0
19	2	Corporate Setup	33 days?	Mon 1/16/12	Wed 2/29/12	⊽
20	2.1	Operating Agreement	1 day?	Tue 1/31/12	Tue 1/31/12	₩
21	2.1.1	% ownership	1 day?	Tue 1/31/12	Tue 1/31/12	0
22	2.1.2	2 % voting / process	1 day?	Tue 1/31/12	Tue 1/31/12	•
23	2.1.3	Profit sharing vs \$ to company for growth	1 day?	Tue 1/31/12	Tue 1/31/12	0
24	2.1.4	% participation	1 day?	Tue 1/31/12	Tue 1/31/12	•
25	2.1.5	How members are elected	1 day?	Tue 1/31/12	Tue 1/31/12	•
26	2.1.6	How members will manage	1 day?	Tue 1/31/12	Tue 1/31/12	0
27	2.1.7	How members will operate to manage the business	1 day?	Tue 1/31/12	Tue 1/31/12	•
28	2.1.8	Officers - President, Treasurer, Secretary	1 day?	Tue 1/31/12	Tue 1/31/12	•
29	2.1.9	9 Indemnity	1 day?	Tue 1/31/12	Tue 1/31/12	0
30	2.1.10	Buy/Sell Agreement	1 day?	Tue 1/31/12	Tue 1/31/12	•
31	2.2	Board of Advisors	1 day?	Wed 2/29/12	Wed 2/29/12	
32	2.2.1	Define Purpose	1 day?	Wed 2/29/12	Wed 2/29/12	4
33	2.2.2	2 Select Members	1 day?	Wed 2/29/12	Wed 2/29/12	4
34	2.2.3	Maximize effectiveness	1 day?	Wed 2/29/12	Wed 2/29/12	4
35	2.2.4	Set meeting schedule	1 day	Wed 2/29/12	Wed 2/29/12	4
36	2.3	Insurance	9 days?	Mon 1/16/12	Thu 1/26/12	
37	2.3.1	General Liability Policy / BOP	1 day?	Mon 1/16/12	Mon 1/16/12	
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				Startup R	oadmap & Project Plan	
ID		ask Name	Duration	Start	Finish Resource Names	Jan '12 Feb '12 Mar '12 Apr '12 May '12 Jun '12
38	Number 2.3.2	Directors & Officers (D&O) Policy	1 day	Mon 1/16/12	? Mon 1/16/12	18 25 1 8 15 22 29 5 12 19 26 4 11 18 25 1 8 15 22 29 6 13 20 27 3 10 1
39	2.3.3	Key Player, Officer Life Insurance Policy	1 day?	Thu 1/26/12	? Thu 1/26/12	
40	2.3.4	Errors & Omissions (E&O) Policy	1 day?	Thu 1/26/12	? Thu 1/26/12	
41	3 St	trategic Setup	49 days?	Thu 1/26/12	Tue 4/3/12	▽ ▽
42	3.1	Values	11 days?	Thu 1/26/12	? Thu 2/9/12	
43	3.2	Vision	1 day?	Thu 1/26/12	? Thu 1/26/12	
44	3.3	Mission	1 day?	Thu 1/26/12	? Thu 1/26/12	
45	3.4	SWOT Analysis for Partners	1 day?	Thu 1/26/12	? Thu 1/26/12	
46	3.5	Key Initiatives	3 days?	Thu 1/26/12	Mon 1/30/12	
47	3.6	Review & Renew Strategic Planning (Quarterly)	3 days	Fri 3/30/12	? Tue 4/3/12	
48	4 M	arketing Planning	24 days?	Mon 1/23/12	! Thu 2/23/12	₹
49	4.1	Competitive Analysis	3 days?	Thu 1/26/12	Mon 1/30/12	○
50	4.1.1	SWOT Analysis - Tool	1 day?	Fri 1/27/12	Sun 1/29/12	♦ 1/29
51	4.1.2	Competitive Research - Tool	3 days?	Thu 1/26/12	Mon 1/30/12	
52	4.2	Ideal Customer Definition - Detailed Questionnaire	3 days?	Mon 1/23/12	Wed 1/25/12	₩.
53	4.2.1	Who exactly is your ideal customer?	1 day?	Mon 1/23/12	Mon 1/23/12	
54	4.2.2	How do they feel when they buy your service?	1 day?	Mon 1/23/12	Mon 1/23/12	
55	4.2.3	Why do they feel that way?	1 day?	Mon 1/23/12	Mon 1/23/12	
56	4.2.4	How do they visualize their gain	3 days?	Mon 1/23/12	Wed 1/25/12	→
57	4.2.4.1	Economically	3 days?	Mon 1/23/12	2 Wed 1/25/12	
58	4.2.4.2	Soft Gains	3 days?	Mon 1/23/12	2 Wed 1/25/12	
59	4.3	Unique Selling Propositions (USPs)	7 days?	Wed 2/1/12	! Thu 2/9/12	─
60	4.3.1	Brainstorm your Secret Sauce	3 days?	Wed 2/1/12	Pri 2/3/12	
61	4.3.2	Select the most promising ones	3 days?	Tue 2/7/12	? Thu 2/9/12	
62	4.4	Elevator Pitch	12 days?	Thu 1/26/12	Fri 2/10/12	▽
63	4.4.1	Severaliterations	1 day?	Tue 2/7/12	? Tue 2/7/12	0
64	4.4.2	10 second	1 day?	Tue 2/7/12	? Tue 2/7/12	6
65	4.4.3	30 second	1 day?	Tue 2/7/12	? Tue 2/7/12	6
66	4.4.4	2 minute	1 day?	Wed 2/8/12	2 Wed 2/8/12	
67	4.4.5	Practice, Practice	1 day?	Fri 2/10/12	Pri 2/10/12	₹
68	4.4.6	Investor Video	1 day?	Thu 1/26/12	? Thu 1/26/12	9
69	4.4.7	Consumer Video	1 day?	Thu 1/26/12	? Thu 1/26/12	9
70	4.5	Branding	10 days?	Fri 2/10/12	Thu 2/23/12	▽
71	4.5.1	Brand Identity	3 days?	Fri 2/10/12	? Tue 2/14/12	lacktriangle
72	4.5.2	Brand Promise	3 days?	Wed 2/15/12	Pri 2/17/12	☆
73	4.5.3	Market positioning	3 days?	Tue 2/21/12	? Thu 2/23/12	
74	4.6	Executive Summary	1 day?	Thu 1/26/12	! Thu 1/26/12	₩
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				Startup Roa	admap & Project Plan	
ID		Fask Name	Duration	Start	Finish Resource Names	Jan '12 Feb '12 Mar '12 Apr '12 May '12 Jun '12
75	Number 4.6.1	Add critical missing components - Professionalize	1 day?	Thu 1/26/12	Thu 1/26/12	18 25 1 8 15 22 29 5 12 19 26 4 11 18 25 1 8 15 22 29 6 13 20 27 3 10 17
76	4.6.2	More concise messaging based on USPs, Competition, etc.	1 day?	Thu 1/26/12	Thu 1/26/12	
77	4.7	Business Plan Update	7 days?	Tue 1/24/12	Wed 2/1/12	▽ ─▽
78	4.7.1	Further Market Analysis	1 day?	Thu 1/26/12	Thu 1/26/12	0
79	4.7.2	Other enhancements	1 day?	Thu 1/26/12	Thu 1/26/12	
80	4.7.3	Financial	7 days?	Tue 1/24/12	Wed 2/1/12	▽──▽
81	4.7.3.1	Pre-Startup Budget, Initial Tool, Bottoms Up	7 days?	Tue 1/24/12	Wed 2/1/12	⊽—⊽
82	4.7.3.1.1	Sales Model	3 days?	Wed 1/25/12	Fri 1/27/12	
83	4.7.3.1.2	Cash Flow Model	7 days	Tue 1/24/12	Wed 2/1/12	
84	4.7.3.1.3	Review Runway	1 day?	Wed 2/1/12	Wed 2/1/12	9
85	4.7.3.2	Financial Projections Enhanced	1 day?	Thu 1/26/12	Thu 1/26/12	₩
86	4.7.3.2.1	Enhanced Sales Model	1 day?	Thu 1/26/12	Thu 1/26/12	0
87	4.7.3.2.2	Enhanced 12 month	1 day?	Thu 1/26/12	Thu 1/26/12	9
88	4.7.3.2.3	Expand monthly to 24 or 36 months	1 day?	Thu 1/26/12	Thu 1/26/12	9
89	4.7.3.2.4	Enhanced 5 year projections	1 day?	Thu 1/26/12	Thu 1/26/12	
90	4.7.3.2.5	Cap Table	1 day?	Thu 1/26/12	Thu 1/26/12	9
91	4.8	Investor Pitch Deck	1 day?	Thu 1/26/12	Thu 1/26/12	•
92	5 (Capital Raising Planning	22 days?	Fri 12/30/11	Mon 1/30/12	▽
93	5.1	Compliance capital sources	1 day?	Thu 1/26/12	Thu 1/26/12	₩
94	5.1.1	Address runway length	1 day?	Thu 1/26/12	Thu 1/26/12	₩
95	5.1.1.1	Pre-Funded Detailed Budget	1 day?	Thu 1/26/12	Thu 1/26/12	0
96	5.1.1.2	Ongoing Pre-Funded budget and Actuals Tracking Spreadsheet	1 day?	Thu 1/26/12	Thu 1/26/12	•
97	5.1.2	Get additional compliance capital	1 day?	Thu 1/26/12	Thu 1/26/12	
98	5.2	Seed Sources	3 days?	Thu 1/26/12	Mon 1/30/12	♥ ♥
99	5.2.1	Decide on emphasis / what capital sources to focus on.	3 days?	Thu 1/26/12	Mon 1/30/12	
100	5.2.2	In which states to raise capital	1 day?	Thu 1/26/12	Thu 1/26/12	9
101	5.2.3	Crowdfunding options	1 day?	Thu 1/26/12	Thu 1/26/12	₩
102	5.2.3.1	Review them for right fit	1 day?	Thu 1/26/12	Thu 1/26/12	•
103	5.2.4	Banking Options	1 day?	Thu 1/26/12	Thu 1/26/12	9
104	5.2.5	Non-Banking Options	1 day?	Thu 1/26/12	Thu 1/26/12	•
105	5.3	Social Media Planning	22 days?	Fri 12/30/11	Mon 1/30/12	▽ ─
106	5.3.1	What venues to focus on - Twitter, Facebook, LinkedIn, Google+	3 days?	Thu 1/26/12	Mon 1/30/12	
107	5.3.2	Get going on Twitter	1 day?	Thu 1/26/12	Thu 1/26/12	0
108	5.3.3	Setup a Facebook Business page	1 day?	Thu 1/26/12	Thu 1/26/12	9
109	5.3.4	Setup a LinkedIn page	1 day?	Thu 1/26/12	Thu 1/26/12	0
110	5.3.5	Engage in debates on other debate sites forums	1 day?	Thu 1/26/12	Thu 1/26/12	0
111	5.3.6	Social Media Implementation Schedule	3 days?	Thu 1/26/12	Mon 1/30/12	
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			<u> </u>	Startup Ro	admap & Project Plan	
ID		ask Name	Duration	Start	Finish Resource Names	Jan '12 Feb '12 Mar '12 Apr '12 May '12 Jun '12
149	Number 6.6.4	Roll marketing into budget	1 day?	Thu 1/26/12	Thu 1/26/12	18 25 1 8 15 22 29 5 12 19 26 4 11 18 25 1 8 15 22 29 6 13 20 27 3 10 1
150	6.7	Trade Shows/Conferences/Associations	2 days?	Thu 1/26/12	Fri 1/27/12	₩
151	6.7.1	Decide best venues w/ max. target markets for investors	1 day?	Fri 1/27/12	Fri 1/27/12	4
152	6.7.2	Where/when to have a booth/table	1 day?	Fri 1/27/12	Fri 1/27/12	
153	6.7.3	Network, network	1 day?	Thu 1/26/12	Thu 1/26/12	
154	6.7.4	Investor meetings	1 day?	Thu 1/26/12	Thu 1/26/12	0
155	6.8	Networking	4 days?	Thu 1/26/12	Tue 1/31/12	
156	6.8.1	Local / national venues with the best effectiveness	1 day?	Tue 1/31/12	Tue 1/31/12	9
157	6.8.2	Local Kiwanas, Rotary, Clubs - get out and meet people	1 day?	Thu 1/26/12	Thu 1/26/12	0
158	6.8.3	Get introductions	1 day?	Thu 1/26/12	Thu 1/26/12	
159	6.8.4	Chambers	1 day?	Thu 1/26/12	Thu 1/26/12	
160	6.9	Lists	15 days?	Fri 1/6/12	Thu 1/26/12	▽─────────────────────────────────────
161	6.9.1	Angel Investor Lists	1 day?	Thu 1/26/12	Thu 1/26/12	9
162	6.9.2	Email Lists - purchase	1 day?	Fri 1/6/12	Fri 1/6/12	
163	6.9.3	Mailing Lists - with bingo card	1 day?	Thu 1/26/12	Thu 1/26/12	0
164	7 0	Operational	115 days?	Fri 12/30/11	Thu 6/7/12	▽
165	7.1	Financial Operations	45 days?	Fri 12/30/11	Thu 3/1/12	₹
166	7.1.1	Hire bookkeeper	1 day?	Fri 1/6/12	Fri 1/6/12	
167	7.1.2	Setup Quickbooks - with remote access	1 day?	Fri 1/6/12	Fri 1/6/12	0
168	7.1.3	Setup Payroll/Distribution policy	1 day?	Mon 1/9/12	Mon 1/9/12	
169	7.1.4	Setup initial expense policies & procedures, system (Expensify)	1 day?	Mon 1/9/12	Mon 1/9/12	
170	7.1.5	Setup initial payment policies & procedures	5 days?	Mon 1/9/12	Fri 1/13/12	
171	7.1.6	Normalize budget with chart of accounts	1 day?	Thu 2/2/12	Thu 2/2/12	, †
172	7.1.7	Import budget into Quickbooks	1 day?	Thu 2/2/12	Thu 2/2/12	,
173	7.1.8	Financial Reporting schedule	1 day?	Fri 1/20/12	Fri 1/20/12	•
174	7.1.9	Keep personal funds separate from business - no co-mingling	1 day?	Fri 12/30/11	Fri 12/30/11	
175	7.1.10	Tax Planning	3 days?	Wed 2/1/12	Fri 2/3/12	
176	7.1.11	Company Medical Insurance	1 day?	Fri 2/17/12	Fri 2/17/12	
177	7.1.12	Monitor EBITDA, expenses against budget and other key metrics	1 day?	Wed 2/1/12	Wed 2/1/12	0
178	7.1.13	Monitor Cash Flow & Runway	1 day?	Thu 3/1/12	Thu 3/1/12	0
179	7.2	Delivery Technology Roadmap	3 days?	Mon 1/9/12	Wed 1/11/12	
180	7.3	Sales Operations	19 days?	Mon 1/2/12	Thu 1/26/12	$ \overline{\triangleright} $
181	7.3.1	Commission Plan	3 days?	Mon 1/2/12	Wed 1/4/12	
182	7.3.2	Sales Pipeline Tracking Tool	19 days?	Mon 1/2/12	Thu 1/26/12	⊽────▽
183	7.3.2.1	Tool requirements selection	1 day?	Thu 1/26/12	Thu 1/26/12	9
184	7.3.2.2	Address tool integration issues - mktg automation	3 days?	Mon 1/2/12	Wed 1/4/12	
185	7.3.2.3	Tool selection	1 day?	Mon 1/2/12	Mon 1/2/12	♦ 1/2
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186	7.3.3	Set Pipeline Metrics/Goals	1 day?	Thu 1/26/12	Thu 1/26/12	A	
187	7.4	Develop/Review Contracts	2 days?	Thu 1/26/12	Fri 1/27/12		
188	7.5	Develop standardized proposal	2 days?	Thu 1/26/12	Fri 1/27/12	9	
189	7.6	Professional Development	1 day?	Thu 1/26/12	Thu 1/26/12	₩	
190	7.6.1	Webinars/Teleseminars on Relevant Subjects	1 day?	Thu 1/26/12	Thu 1/26/12	•	
191	7.6.2	Paid learning programs	1 day?	Thu 1/26/12	Thu 1/26/12	9	
192	7.7	Company Operations	93 days?	Tue 1/31/12	Thu 6/7/12	▽	$\overline{}$
193	7.7.1	Design systems	3 days	Tue 1/31/12	Thu 2/2/12	,	
194	7.7.2	Document business systems	3 days?	Tue 1/31/12	Thu 2/2/12	<u> </u>	
195	7.7.3	Review and Update business systems	3 days?	Tue 6/5/12	Thu 6/7/12		♦ 6/7
196	7.7.4	Setup document management/version control/sharing tool	1 day?	Tue 1/31/12	Tue 1/31/12	0	

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So you know, it takes money to raise money. You don't just write a business plan and send it to investors. See my **Funding Roadmap**....next.

