

36 IMPORTANT ACTION ITEMS TO START YOUR SKILLED TRADES BUSINESS

***Below you will find a step-by-step checklist to start any business in the skilled trades Just remember, these activities matter very little if you can't first figure out how to create something of value and convince others to pay for it in an exchange that benefits both parties.

Figuring out your value proposition – in other words, what you sell that brings value to others – is key in this early stage. Once you figure out your value proposition, all of these other steps below are relatively easy and just require time to complete.

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PHASE 1: FIRST THINGS FIRST



Check them off as you go

- ☐ **1 DECIDE ON A SERVICE THAT SOLVES A REAL CUSTOMER NEED**
 - You need to be solving real problems and convincing customers that your service is worth paying for.
- ☐ **2 DECIDE ON A BUSINESS NAME**
 - A business name should be simple, short, and easy to remember. It's best if this name is one or two words, ideally no more than 3.
- ☐ **3 INCORPORATE**
 - This can be done on websites like Legal Zoom for around \$150-200 or directly with the Secretary of State in most states for around \$50.
- ☐ **4 APPLY FOR AN EIN NUMBER (*Employer Identification Number*)**
 - You can't set up a business bank account without an EIN number, so head out to the IRS website and apply for your EIN number for free.
- ☐ **5 DECIDE ON THE ADDRESS FOR THE BUSINESS**
 - Our recommendation is to NOT go and rent office space but start the business out of your garage or some other low-cost space, maybe even a storage unit, etc.
- ☐ **6 DECIDE ON JOB ROLES**
 - Determine up front and IN WRITING what each person involved in the business is going to do so that everyone is clear on their roles. If you aren't sure what each role is going to be, you can wait until the business has been running for a few weeks and then clearly define job roles.

- ☐ **7 DETERMINE INITIAL EQUITY SPLIT**
 - If you're going to have business partners (which we don't recommend), put the percentage ownership of each person into a written document and create an operating agreement.
- ☐ **8 GET A COMPANY PHONE LINE & VOICEMAIL**
 - You can do this for free through Google Voice or add an additional line through your cell phone provider.
- ☐ **9 DETERMINE WHAT INSURANCE YOU NEED**
 - This will vary for each skilled trade industry.
- ☐ **10 DETERMINE WHAT CERTIFICATIONS, LICENSES OR PERMITS YOU NEED**
 - Each trade requires different certifications, licenses, and permits to do certain kinds of work. You'll need to figure out what qualifications you need to conduct work in your area.



PHASE 2: FINANCIAL ACTION ITEMS



Check them off as you go

- ☐ **11 OPEN A BUSINESS BANK ACCOUNT**
 - Once you've received your incorporation documents and EIN number, we recommend scheduling a time to meet with your local business banker and taking the time to set up a business bank account AND savings account. We recommend a bank like JP Morgan Chase or any other financial organization that offers excellent business credit card options along with setting up the bank account.
- ☐ **12 APPLY FOR A COMPANY CREDIT CARD**
 - This can often be done while setting up your business bank account. We recommend Capital One, American Express and Chase Business credit cards for some of the best options and reward programs
- ☐ **13 SET UP COMPANY EMAILS**
 - It's nice to start your business with at least one professional company email. If you build your website with Build Up, we will give you up to 3 company emails for free included with our website hosting.

☐ 14 SET UP GUSTO FOR PAYROLL

- Gusto is hands down one of the simplest and cheapest options for running payroll inhouse. At the time of this writing, it is only \$40/m to run payroll yourself with Gusto's software. Sign up with our referral link to get \$100 with Fiverr.

Link: <https://www.fiverr.com/pe/dB99V3> It's simple and intuitive to use and highly recommended as a valuable resource.

☐ 15 FIND A QUALIFIED BUSINESS TAX ACCOUNTANT

- You can look through our qualified tax accountants that we know can do a good job at an affordable rate or find one on your own.



PHASE 3: BRANDING / WEBSITE / ONLINE



Check them off as you go

☐ 16 GET A LOGO / DECIDE ON BRAND COLORS

- We recommend getting your logo designed with Fiverr or 99Designs.com.

☐ 17 PURCHASE A WEBSITE DOMAIN

- This can be done on a variety of websites such as GoDaddy.com, or you can have Build Up help you purchase and properly set up your domain.

☐ 18 SET UP COMPANY EMAILS

- It's nice to start your business with at least one professional company email. If you build your website with Build Up, we will give you up to 3 company emails for free included with our website hosting.

- ☐ **19 CREATE EMAIL SIGNATURES**
 - Once your emails have been set up, we recommend using your logo and contact information to create a professional looking email signature. If you don't know how to do this, Build Up can help set these up when you build your website with us.
- ☐ **20 BUILD A WEBSITE**
 - Build Up offers to build a \$1000 one-page website to get you started. Otherwise, there are other places to get a quick, inexpensive website set up such as WIX or Squarespace.
- ☐ **21 HAVE BUSINESS CARDS MADE**
 - We recommend Vista Print as an inexpensive place to have these set up and printed.
- ☐ **22 HAVE COMPANY APPAREL MADE**
 - Vista Print is also a great affordable resource for company apparel.
- ☐ **23 DECIDE IF YOU WANT BRANDING ON YOUR VEHICLE**
 - You can get simple and cheap car magnets that can be printed at Vista Print cheaply and applied to the side of your vehicle or spend more with a company that specializes in professional vehicle graphics.
- ☐ **24 CREATE MARKETING MATERIALS (BROCHURES, DOOR HANGERS, ETC.) IF NEEDED**
 - We recommend a small niche company called Ballpoint Marketing for all of these kinds of materials. They also provide handwritten messages on their marketing materials for a personal touch.



PHASE 4: LEAD GENERATION ACTION



Check them off as you go

- ☐ **25 SET UP COMPANY GOOGLE BUSINESS PAGE**
 - Build Up can help you get a Google Business page set up. This is imperative to the growth of your business and is the start to figuring out how to get your phone ringing with interested customers.

☐ **26 INVEST INTO 5-STAR REVIEWS FOR YOUR GOOGLE BUSINESS PAGE**

- It's essential that you invest into finding ways to get friends, family, and basically anyone that is interested in helping to write you Google Biz reviews. At some point early on it will be important to pay for ads with Google to drive traffic to your website. Having your Google Biz page dialed in will be an important part of building credibility with your audience.

☐ **27 SET UP SOCIAL MEDIA ACCOUNTS**

- Build Up can help you set up your social media pages. These will also be valuable for finding interested leads for your business if you run social media ads in your local area.

☐ **28 SET UP CONSTRUCTION BIDDING PROFILES**

- Companies like The Blue Book and Bid Clerk are set up to help you identify construction projects in your area that you can bid on. This will be an essential piece to growing your business down the road. We recommend sticking with one of the larger ones like The Blue Book and starting to develop an understanding of how the bidding process works.



PHASE 5: BUTTONING UP OTHER LOOSE ENDS



Check them off as you go

☐ **29 CREATE WORKING AGREEMENT DOCUMENT**

- You can refer to our "Guides, Documents & Checklists" section of Build Up for these document templates.

☐ **30 CREATE CREDIT CARD AUTHORIZATION DOCUMENT**

- This document can also be found in our "Guides, Documents & Checklists" section of the website.

☐ **31 CREATE JOB AD FOR HIRING YOUR FIRST EMPLOYEES**

- You can refer to our "Guides, Documents & Checklists" section for a template to help you start to write this. Indeed.com is one of the most popular and effective places to post your job ad when looking for quality employees.

**32****EMPLOYEE PAPERWORK**

- You will need documents such as an offer of employment, tax paperwork and direct deposit forms to get new hires set up in your database for payroll. We have all these template documents available in our “Guides, Documents & Checklists” section of Build Up. (Gusto will take care of most of these onboarding documents if you decide to use their payroll software. Otherwise, you will need to get these documents yourself.)

**33****SET UP SCHEDULING SOFTWARE FOR CUSTOMERS**

- Google has software for scheduling that’s easy to use, and there are many other options out there that can probably work just as well.

**34****DECIDE ON CRM SOFTWARE** (*Customer Relationship Management software*)

- This is often simple software for keeping track of your leads and creating actionable steps to follow up with them. Copper CRM (made by Google) is very intuitive for a small monthly fee, or you can also just use an excel or Google spreadsheet for free.

**35****SET UP PROPOSIFY TO HELP YOU CREATE PROFESSIONAL LOOKING PROPOSALS**

- You can create basic estimates in Waveapps.com for free, but if you want to prepare a more professional looking proposal for larger potential jobs, we recommend Proposify.com, a software that gives you professional, editable proposals that will elevate the look and feel of your proposals.

**36****CLOUD STORAGE**

- You will want a place to store your documents in the cloud. Google Drive is going to be a free option, and Dropbox is affordable and reliable as well.