

Therapy Practice Checklist

Version: 1.8

License: CC BY 4.0 - Free to use, modify, and share

Table of Contents

1. [Introduction](#)
2. [Pre-Launch Checklist](#)
3. [Legal Requirements](#)
4. [Operations Setup](#)
5. [Marketing & Launch](#)
6. [Post-Launch](#)
7. [Resources](#)

Introduction

This comprehensive checklist will guide you through every step of launching your therapy practice checklist. Each section includes detailed sub-tasks, tips, and common pitfalls to avoid.

Pre-Launch Checklist

Market Research

- ☐ Define your unique value proposition
- ☐ Identify target customer demographics
- ☐ Analyze competitor offerings and pricing
- ☐ Conduct customer interviews (minimum 20)
- ☐ Validate demand through surveys or pre-orders
- ☐ Research industry trends and forecasts

Business Planning

- ☐ Create detailed business plan
- ☐ Develop financial projections (3-year minimum)
- ☐ Set SMART goals for first year
- ☐ Identify key performance indicators (KPIs)
- ☐ Create contingency plans for common scenarios
- ☐ Define exit strategy

Funding

- ☐ Calculate total startup costs
- ☐ Identify funding sources
- ☐ Prepare loan/investment documentation
- ☐ Apply for grants if applicable
- ☐ Set up financial tracking systems
- ☐ Create cash flow projections

Legal Requirements

Business Structure

- ☐ Choose business entity type (LLC, Corp, etc.)
- ☐ Register business name
- ☐ Obtain EIN from IRS
- ☐ Register for state and local taxes
- ☐ Set up business bank accounts
- ☐ Get business credit card

Licenses & Permits

- ☐ Research required licenses for your area
- ☐ Apply for business license
- ☐ Obtain industry-specific permits
- ☐ Register for sales tax permit

- ☐ Check zoning requirements
- ☐ File DBA if using different name

Insurance & Legal

- ☐ Get general liability insurance
- ☐ Obtain professional liability if needed
- ☐ Consider property insurance
- ☐ Review workers' comp requirements
- ☐ Create/review contracts and agreements
- ☐ Establish privacy policy and terms

Operations Setup

Location & Equipment

- ☐ Secure business location
- ☐ Negotiate lease terms
- ☐ Plan layout and design
- ☐ Purchase necessary equipment
- ☐ Set up utilities
- ☐ Install security systems

Suppliers & Inventory

- ☐ Research potential suppliers
- ☐ Request quotes and samples
- ☐ Negotiate terms and pricing
- ☐ Set up vendor accounts
- ☐ Create inventory management system
- ☐ Establish reorder points

Systems & Processes

- ☐ Create standard operating procedures
- ☐ Set up accounting system
- ☐ Implement customer management system
- ☐ Establish quality control processes
- ☐ Create employee handbook
- ☐ Set up communication systems

Marketing & Launch

Brand Development

- ☐ Create brand identity
- ☐ Design logo and brand assets
- ☐ Develop brand voice and messaging
- ☐ Create style guide
- ☐ Register trademarks if needed
- ☐ Order business cards and materials

Online Presence

- ☐ Register domain name
- ☐ Build website
- ☐ Set up Google My Business
- ☐ Create social media profiles
- ☐ Implement SEO strategies
- ☐ Set up email marketing

Launch Strategy

- ☐ Plan grand opening event
- ☐ Create promotional materials
- ☐ Develop pricing strategy
- ☐ Plan initial marketing campaigns
- ☐ Reach out to media contacts
- ☐ Schedule social media content

Post-Launch

First Month

- ☐ Monitor daily operations closely
- ☐ Gather customer feedback
- ☐ Track KPIs daily
- ☐ Adjust processes as needed
- ☐ Address issues immediately
- ☐ Celebrate small wins

Ongoing Success

- ☐ Review financials weekly
- ☐ Conduct monthly performance reviews
- ☐ Update marketing strategies
- ☐ Maintain customer relationships
- ☐ Continue professional development
- ☐ Plan for growth and scaling

Resources

Helpful Links

- [Small Business Administration \(SBA\)](#)
- [SCORE Mentorship](#)
- [Industry associations](#)
- [Local business development centers](#)

Templates Included

- [Business plan template](#)
- [Financial projection spreadsheet](#)
- [Marketing calendar](#)
- [Operations checklist](#)
- [Employee handbook outline](#)

Community Support

Join our community forum to:

- Ask questions
- Share experiences
- Get feedback
- Find accountability partners
- Access exclusive resources

Remember: This checklist is a living document. Customize it for your specific needs and circumstances. Success comes from taking action, learning, and adapting.

Need Help? Visit our community forum at openchecklist.org/community

Version History:

- 1.8 - Current version
- Previous versions available in archive

Contributors: Thank you to all 24 contributors who helped create this checklist!

This checklist is provided under Creative Commons BY 4.0 license. You are free to use, modify, and share.