

Business Checklist

Email and Phone

- Download Google Chrome Web Browser
- Pick Domain Name For Future Website - We recommend using your name so that you are not tied to any niche or type of coaching and it creates space for you to grow.
 - exp. Stacysmithcoaching.com, Stacysmithconsulting.com, Stacysmith.com
 - If you are going to use Squarespace or Wix to build your future website you can buy your domain through those programs. You can also just use google domains to purchase your domain.
 - PLEASE DO NOT SPEND MORE THAN 24-Hours deciding on this. Pick something and move forward! You can always change this.
- Set up Gsuite account (and check the HIPAA Compliance box)

Now that you have your email, all your other accounts can be created with that email address.

Business Entity & Taxes

- Research and decide if a Sole Prop or an LLC is right for you here:
 - This is done through your county clerk office in your town
 - If you do not have a business name, we advise you to keep it simple. Ex: SK Coaching, "Your Name Coaching"
- Do you need an EIN:
- [Click Here To Look Up If You Need an EIN](#)
- Set up a business banking account once your sole prop or LLC is filed and approved
- Get a business credit card or use one personal credit card dedicated to your business for ease
- Set up excel/google excel sheet to track your expenses and income for taxes
 - Do not make this complicated! Write down what you earn and then what you spend for your business, easy as that!
- Be prepared to file quarterly taxes although I wouldn't worry about this until you have made 5K. If you have a CPA make an appointment to consult on any guidance for you on this.

Practice Software - Practice Better

- Download Practice Better and Create a Free Account

Create Payment Portal and Connect to your Business Checking Account

- Square - [Square](#)
- Stripe - [Stripe](#)
 - Both of these have HIPPA compliant options and similar fees. They also interface well with Practice Better which is the practice management software that we recommend.

Practice Management Software

[Practice Better](#)

- Watch Training videos through Practice Better
- Upload your contract into Forms
- Set Up Calendar with availability
- Connect it to your Payment Portal (Stripe or Square)
- Connect to your zoom account
- Set up 'Services'

You will have more clarity on what your services will be after going through the program and crafting your offer. Start simple.

1. Coaching Call 60 minutes
2. Coaching Call 120 minutes
3. Quick Chat 30 minutes