
CEO TRANSFORMATION TECHNOLOGIES LLC

CEO BUSINESS STARTUP CHECKLIST™

Build the foundation before you build the empire.

FREE CEO RESOURCE

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BUILD THE FOUNDATION BEFORE YOU BUILD THE EMPIRE.

An LLC and EIN make the business official on paper. They do not automatically make it operational. The gaps usually show up later: a bank asks for a document, a customer needs a contract, a lender sees inconsistent information, or the owner realizes every lead is sitting in text messages. This checklist is for catching those problems early.

USE IT LIKE A REAL CHECKLIST

Only check what is complete today. 'I plan to do it this week' is not complete. If an item depends on state, local or industry rules, verify the requirement instead of guessing. A short list of real gaps is more useful than a perfect-looking checklist that is not true.

BUSINESS IDENTITY

- ☐ Business name selected and checked for availability.
- ☐ Entity structure selected based on the owner's actual needs, not because somebody online said every business should use the same structure.
- ☐ Business registered with the appropriate state authority when required.
- ☐ EIN obtained directly from the IRS when applicable.
- ☐ NAICS/SIC classification reviewed for accuracy.
- ☐ Business address, phone and professional email established.
- ☐ Domain name secured.

LEGAL & COMPLIANCE

- ☐ Operating agreement, bylaws or ownership documents prepared when applicable.
- ☐ Required state, county or city licenses researched.
- ☐ Industry-specific permits researched.
- ☐ Registered agent information is current.
- ☐ Annual report and renewal dates are recorded.
- ☐ Contracts, policies and disclosures are identified for the business model.

MONEY & BANKING

- ☐ Dedicated business bank account opened.
- ☐ Payment processor selected if needed.
- ☐ Bookkeeping method selected.
- ☐ Startup budget created.
- ☐ Monthly operating budget created.
- ☐ Revenue and expense tracking process created.
- ☐ Tax planning and recordkeeping process established.

OPERATIONS & TECHNOLOGY

- ☐ Website or landing-page plan created.
- ☐ Customer inquiry and sales process documented.
- ☐ CRM or lead-tracking method selected.
- ☐ Invoice and payment process established.
- ☐ Document storage system created.
- ☐ Business calendar and task system established.
- ☐ Backup and account-security practices reviewed.

CREDIT & CAPITAL FOUNDATION

- ☐ Business credit profiles researched.
- ☐ Business identity is consistent before opening credit accounts.
- ☐ Vendor or credit accounts are opened because they serve a real business need, not just to collect tradelines.
- ☐ Payment due dates are tracked.
- ☐ Funding goal and purpose are documented.
- ☐ Basic funding file folder is created.

YOUR 30-DAY STARTUP ACTION PLAN

WEEK 1 - IDENTITY

- ☐ Verify business name/entity information
- ☐ Secure EIN, domain and contact information
- ☐ Research licenses and permits

WEEK 2 - MONEY

- ☐ Open or organize business banking
- ☐ Choose a bookkeeping process
- ☐ Create startup and monthly budget

WEEK 3 - OPERATIONS

- ☐ Document the sales/customer process
- ☐ Choose a CRM or tracking system
- ☐ Organize contracts and document storage

WEEK 4 - GROWTH FOUNDATION

- ☐ Review the business credit foundation
- ☐ Define the funding goal
- ☐ Create the first 90-day growth priorities

My first priority is:

The compliance item I need to verify is:

The system I need to create is:

My 90-day business goal is:

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