

Corporate Escape Checklist



Start & Grow Your Coaching or Consulting Business

by Liane Fletcher & Ivana Katz

Welcome to Your Corporate Escape Checklist

Starting your own coaching or consulting business can be an exhilarating journey but it's not always an easy one. We have both been in the corporate world and run multiple businesses.

We understand how you may be feeling right now - a little apprehensive mixed with excitement. You want to succeed and you can.

We've developed this Ultimate Checklist which covers everything from Business Planning and Strategy, setting up your financials and operations, to website design, branding and marketing your business.

We wish we had this list when we started! This checklist will set you up well to start and grow your business, however if you do need some support along the way, you can reach out to us.

You will:

- **Save Time:** We allow you to focus on what you do best—coaching and consulting.
- **Avoid Mistakes:** We help you navigate potential pitfalls, ensuring your business is set up correctly from the start.
- **Gain Valuable Insights:** We provide you with knowledge and advice having successfully launched and grown our own businesses.
- **Accelerate Your Launch:** We can get your business up and running much faster, so you can start serving clients and generating income sooner.

Don't let the fear of the unknown hold you back. Reach out for help and make your business launch smoother and faster. Your future self will thank you!

Wishing you much success,

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Corporate Escape Checklist

Start & Grow Your Coaching or Consulting Business

1 Business Planning & Strategy

1. Determine the appropriate business structure (sole proprietorship, partnership, corporation) ☐
2. Register your business name and website domain name and obtain necessary licenses, permits, certifications, insurance policies (professional indemnity), confidentiality agreements & privacy policy. ☐
3. Develop a comprehensive business plan. Don't make it too long! ☐
4. Set specific, measurable, achievable, relevant, and time-bound (SMART) goals ☐
5. Conduct market research to establish your unique value proposition (your point of difference) and competitive advantage ☐
6. Determine your pricing strategy and fee structure ☐
7. Identify potential strategic partnerships and collaborations ☐
8. Develop client contracts and terms of service ☐



2 Finances, Accounting & Operations

We always recommend that you speak with your accountant first when setting up your financial and accounting systems. Once you've spoken to your accountant, here are steps to help you get started:

9. Establish a bookkeeping and accounting system (e.g., Xero)
10. Set up a business bank account and separate personal and business finances
11. Develop a financial plan and budget
12. Understand your tax obligations and company filing requirements
13. Establish a system for invoicing and collecting payments
14. Secure a professional workspace (home office, co-working space, or office rental)
15. Invest in necessary equipment and technology (computer, software, communication tools)
16. Establish secure data storage and backup systems
17. Develop standard operating procedures and processes
18. Implement project management and time-tracking systems





Branding, Website Set-Up & Design

Branding

- 19. Develop a strong brand identity and to reflect your why (your purpose) ☐
- 20. Brand Guidelines: define your brand's visual identity, including logo usage, colour palette, typography, and imagery style. ☐
- 21. Use high-quality images including professional images of yourself, that will enhance the visual appeal of your website ☐
- 22. Brand Voice: Define your brand's tone of voice and messaging guidelines to ensure consistency in how you communicate with you audience. ☐
- 23. Visual Design: Create a visually appealing and cohesive design that reflects your brand personality and resonates with your target audience. ☐
- 24. Brand Storytelling: Use storytelling to connect with your audience on an emotional level and communicate your brand's values, mission, and purpose. ☐
- 25. Brand Experience: Ensure that every interaction with your website reinforces your brand identity and creates a memorable experience for your audience. ☐

Website Setup

- 26. Choose a hosting provider who stores website files and makes them accessible on the internet ☐
- 27. Obtain an SSL certificate that encrypts data transmitted between your website and users' browser, ensuring a secure connection ☐
- 28. Set up email accounts associated with your domain which allows you to communicate professionally with your clients. ☐
- 29. Create a site map (a visual representation) of the structure and organisation of your website showing how different pages are connected and navigated. ☐

Website Design

30. Choose a website design platform eg. Wordpress, Wix, Squarespace
31. Use pre-designed templates as a starting point for your website
32. Create simple website navigation
33. Choose relevant plugins/add-ons to extend website functionality
34. Ensure your website is mobile-friendly
35. Choose an SEO tool (eg: SEMRush or Moz) to optimise your website to rank higher in search engines
36. Set up an Analytic tool (eg Google Analytics) to provide valuable insights in your website performance and user behaviour
37. Use high-quality, optimised images throughout your website
38. Maintain a consistent layout across your website
39. Add relevant pages including homepage, services pages, product pages, about, contact, FAQs, media mentions, client details, portfolio, resources, privacy policy, terms & conditions, etc
40. Create effective calls to action (CTA) such as: buy, contact, sign up
41. Write compelling content & focuss on solving customer problems
42. Set up a blog and share content to establish yourself as an authority
43. Add social proof including testimonials, case studies, success stories and reviews, media mentions, well known suppliers / clients
44. Implement social sharing buttons
45. Integrate an email sign-up form to capture visitors email address
46. Incorporate multimedia content like images, videos and infographics to enhance your website and engage your audience.
47. Implement backup solutions to protect your website data
48. Ensure your website functions across different web browsers



4 Marketing Your Business

- 49. Set your marketing goals eg: generate leads, increase website traffic, improve search engine rankings, increase brand awareness ☐
- 50. Define your niche area ie: what do you specialise in and become the expert in that specific area ☐
- 51. Identify your target audience, using demographics, psychographics, customer personas and buying behaviour. ☐
- 52. Create a unique value proposition that differentiates you from your competition and stand out. ☐
- 53. Develop marketing materials (eg: brochures, business cards, presentations) ☐
- 54. Decide how you will package your services. Eg: Consulting, group workshops, membership program, online courses, keynote speaking, affiliate program, paid newsletters, digital downloads.. ☐
- 55. Identify key marketing strategies eg: social media strategy, content marketing strategy, email marketing strategy, SEO strategy ☐
- 56. Establish a system for tracking and measuring marketing efforts ☐

Social Media Strategy

Develop a social media strategy on platforms such as Facebook, Instagram, LinkedIn, X, YouTube and TikTok.

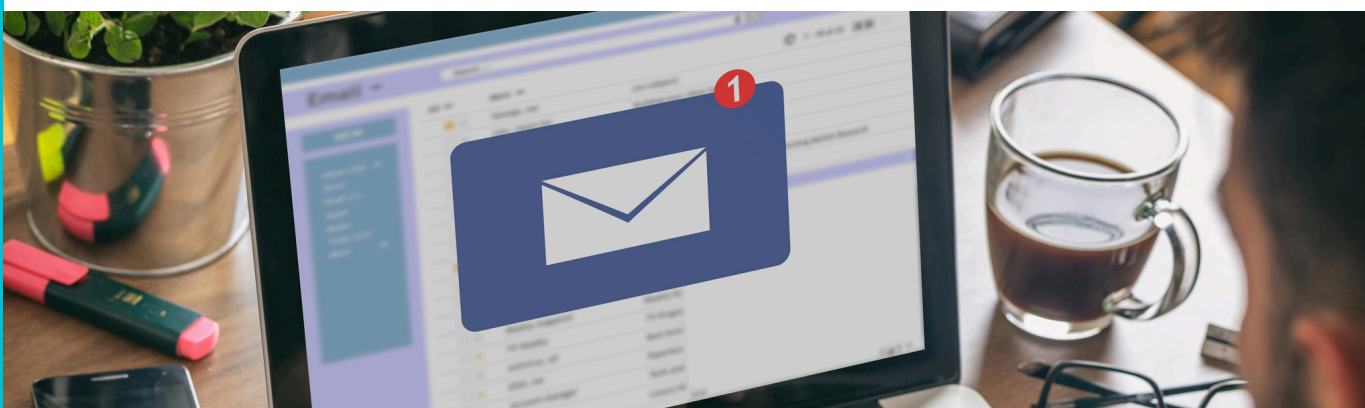
- 57. Check your profiles are complete and optimised with keywords ☐
- 58. Plan and create content that is relevant and valuable to your audience ☐
- 59. Schedule and publish your content on a consistent basis and engage with your audience by responding to comments and messages ☐
- 60. Partner with other businesses to cross-promote each other's content ☐
- 61. Participate in groups and communities ☐
- 62. Use relevant/trending hashtags to help your content get discovered ☐
- 63. Host events and webinars to increase visibility and provide value ☐
- 64. Share customer reviews and testimonials to increase credibility ☐

Content Strategy

- 65. Identify the keywords that your target audience is searching for, and optimize your content for those keywords (inc meta descriptions & titles, header tags, image alt tags) ☐
- 66. Create a variety of content, such as blog posts, infographics, client testimonials, videos, and webinars, to cater to different learning styles - batch create using AI ☐
- 67. Focus on creating high-quality content that provides value to your target audience ☐
- 68. Promote your content through social media and email marketing ☐
- 69. Repurpose your content by turning blog posts into videos, podcasts, infographics, online courses, slide shows, social media posts etc ☐
- 70. Be consistent with your content creation and promotion efforts, and stick to a regular publishing schedule ☐
- 71. Engage in guest blogging on reputable websites to build authority ☐

Email Marketing Strategy

- 72. Set up an email marketing service provider (eg: Hubspot, GetResponse) ☐
- 73. Create a lead magnet on your website to capture email addresses ☐
- 74. Write subject lines that grab attention and improve email open rate ☐
- 75. Develop content that is relevant, informative, and engaging ☐
- 76. Include a clear and prominent calls-to-action (CTA) ☐
- 77. Use a visually appealing email design ☐
- 78. Use personalization such as name and company details ☐
- 79. Segment audience and send relevant content to improve engagement ☐
- 80. Use automation tools to send welcome emails, abandoned cart reminders, and post-purchase follow-ups ☐
- 81. Test various elements of your email marketing efforts, such as subject lines, design, and content ☐



Search Engine Optimisation Strategy

SEO (Search Engine Optimisation) is essential for driving organic traffic to your website and improving your visibility in search engine results.

- 82. Set up Google Search Console and Bing Webmaster tools for a free way to monitor your site's performance and traffic ☐
- 83. Install an SEO plugin to track your keywords
- 84. Use tools like Google Keyword Planner, Ahrefs or Moz to identify relevant keywords (including long-tail keywords) ☐
- 85. Create and submit your sitemap ☐
- 86. Create a Robots.txt file to tell search engine bots which parts of your website they're allowed to crawl and index. ☐
- 87. Build a Google My Business profile page to boost your local SEO. ☐
- 88. Use SEO tools to identify and fix technical issues like broken links, error pages, duplicate content and slow loading times ☐
- 89. Add title tags, meta descriptions and image tags ☐
- 90. Acquire high-quality backlinks from other relevant websites ☐
- 91. Build internal links and link to authority sites in your articles ☐
- 92. List your business in online directories and local listings and on platforms like Google My Business, Yelp, or Bing Places for Business ☐
- 93. Create relevant and actionable content such as how-to and step-by-step instructions ☐

Networking/Referral Strategy

- 94. Identify key conferences in your industry and actively participate by attending sessions, networking events, and discussion panels ☐
- 95. Position yourself as an expert by hosting online webinars and face-to-face workshops ☐
- 96. Participate in local Chamber of Commerce events or other business networking groups ☐
- 97. Use LinkedIn to connect with industry peers, share valuable content and engage with posts from your network ☐
- 98. Contribute to discussions in online groups ☐
- 99. Seek speaking opportunities at industry events or on podcasts ☐
- 100. Collaborate with others on joint ventures or co-hosted events ☐
- 101. Develop a referral program for your clients ☐

Congratulations You Got Through The Corporate Escape Checklist!

However if you've been unable to complete it all on your own, and you need further support to launch your coaching or consulting business faster please reach out to either Liane or Ivana.

We are so pleased to support you on business journey.

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