

## CHOOSING A DOMAIN NAME CHECKLIST

### Keep it short.

Get straight to the point. This is not the time to get clever, you want your domain name to be you brand. Make it short and simple.

### Make it memorable.

This is all about impact and recall. Remember that longer domains are often harder to remember.

### Make it easy to type.

Your customers need to type your domain into the address bar. Even if they're clicking a link, that link needs to be typed in by someone.

### Make it easy to pronounce.

People remember (and have more positive associations with) things that they can easily say and think about. If you can't easily say the name, you're going to lose memorability.

### Use keywords where possible.

If there are relevant keywords that match your brand and what your business offers, this is a great opportunity for an SEO boost. Local painting business? JoesPainting.us is a solid keyword domain name.

### Check for trademarks.

Make sure your domain isn't easily confused with other businesses in the market. Remember it's not whether you think your domain is confusing, but whether a company might take legal action against you, if they consider your domain name is infringing on their trademark. Get legal advice when in doubt.

### Avoid numbers, hyphens and other symbols.

When trying to get around limited domain name availability, some people choose to include hyphens between words to create a more unique combination. While this strategy is understandable, the main difficulty with hyphenated web addresses is customer recall. They're trickier to say aloud and add an extra piece of information for customers to remember.

### Remember to renew.

Don't risk letting your domain name renewal lapse. As soon as you miss that annual renewal your domain hits the market where anyone is able to scoop it up. Opt for auto-renew or 3-5 year renewal options with your hosting company.

# CHECKLIST FOR LAUNCHING YOUR NEW WEBSITE

## ❑ Register a short and memorable domain name.

Remember, your domain name becomes your brand, make sure people can easily find and remember your web address. Register your domain with a hosting provider like GoDaddy, Bluehost or Name.com. Whoever you choose, test their customer support and ask about their options for securing your site and keeping regular backups.

## ❑ Pick a mobile-responsive design.

Most hosting providers have a selection of templated sites to choose from, or source one on your own. Whether it's a multi-page site or a single landing page, make sure to choose a **mobile-responsive design** (this means your website will function and read well on mobile devices as well as laptops and desktops.)

## ❑ Set up analytics.

There are several free services out there such as Google Analytics that allow you to track and monitor your web traffic for meaningful insights that can help with marketing and business strategy down the road. Integration is as simple as copying and pasting a small snippet of code on the backend of your site. Make sure to drop it in either the header or the footer if you have a multi-page site as you will want this to fire on every page.

## ❑ Create a clear 'About' page with key information.

Customers need to easily find opening hours, contact details, location. Make sure this information is all in text format so that it can be read by search engines and it's a better user experience for your customers. Not sure if it's text? Try highlighting part of your address or phone number on the live version of your site. You should be able to copy and paste the information.

## ❑ Publish & refresh content regularly.

Start small. You don't need to have a daily blog or multi-page website right away. Integrating your social channels through a feed of your posts is one way to keep the site up to date. Just make sure you strive for quality over quantity. Search engines are sophisticated enough to tell the difference and they will point users to whichever website offers the better experience.

## ❑ Keep important information "above the fold."

Everything customers need to know about your company at a cursory glance should be visible above the fold. Fill this valuable website real estate with brand imagery and messaging, site navigation, and your call to action. Don't try to jam everything above the fold - Group content into readable chunks with sufficient whitespace to ensure users can easily skim and scan.

# BUSINESS PLAN: ESSENTIAL SECTIONS TO COVER

The whole process of writing a business plan will help you formalize your company's identity and formulate the goals you need to meet in order to succeed. Your business plan should be clear, concise and detailed, and no greater than 20 pages in length.

**While there isn't a one-size-fits-all formula for writing a business plan, there are certain areas that almost all successful business plans cover. We recommend that you add your own personal spin to the concepts below. The areas your plan needs to cover are as follows:**

- Executive Summary:** The most important piece of the puzzle, this piece must convince readers that this plan is worth reading and hearing out. Executive summaries are usually a page long and cover these six topics:
  - Mission Statement: What your company is and what are your goals?
  - General Company Information: State of incorporation, founders and employees and physical locations.
  - Highlights: What kind of traction are you seeing early on? What opportunities are possible?
  - Products and Services
  - Financial Goals: Do you want a business loan, grant or other funding?
  - Future Plans
  
- Company Description:** What does your business do, and what makes it different than your competitors? What market or type of customer will you cater to? What is your company's strengths? This is your elevator pitch. Make it count.
  
- Market Analysis:** Show that you know how to research your industry and have a master understanding of all the details. Your market analysis should include an industry description; target market overview and characteristics; target market size and growth potential; your market; share potential; market pricing and promotional strategies; potential barriers to entry and research on competitors.

- Business Organization:** What is the logistical and legal structure and hierarchy for your organization? For your logistics, have a chart that covers your company's organization and who oversees what. Lay out responsibilities, background and experience for all your employees and any immediate hiring needs. Also, is your company a sole proprietorship, LLC or S Corp? Let your lenders know what legal protections you have in place.
- Product Development Plan:** Cover your products sold or services provided here. What needs are they satisfying and why would customers purchase said products or services over those offered by your competitors. Detail sourcing and fulfillment, intellectual property rights, current status of your products and any future plans for growth and improvement.
- Marketing and Sales Plan:** Settle on the two key points of positioning and promotion. Positioning covers your branding, company culture and reputation. Promotion focuses on your plan for bringing attention to your company, covering ad space to marketing practices. For sales, discuss each step by step of your sales process, from who makes them, which tools are used and what is the strategy of obtaining, converting and maintaining leads.
- Financial Plan and Projections:** Cover your current and future financial situation. New businesses are expected to present projections and forecasts for your future financial success. List projections for a minimum of 12 months into the future. The best business plans usually go three to five years down the line. Adjustments will be made as variables change. You want to create a baseline that you will hopefully exceed.
- Funding Request:** You have described your financial expectations, now describe how an additional infusion of funds will lead you to success. What amount of funding will be necessary over the next five years? Why? Where will these funds be invested in your business? Lay out expectations for your lenders and investors.
- Appendix:** Add your supporting documents, materials, contracts, permits, licenses, resumes, credit histories, etc. Charts, graphs and points of reference also make the appendix their home.
- Writing the Best Possible Plan**
  - Research Exhaustively:** Know your business and industry back and forth.
  - Make It Adaptable:** Modify your plan based on your audience. Emphasize your financial projections; for investors, amplify the value your team is bringing to the table.
  - Make It Personal:** Express yourself and your passion. When you let others know why you care, others will follow suit.

# 8 WAYS TO STRENGTHEN YOUR PERSONAL BRAND ON YOUR WEBSITE

- Establish Domain** — Your domain should be concise, emphasize professionalism, and communicate reliability in order to establish your credibility in an easy-to-remember format

**Best practice tip:** A personal website is no good if no one can find it. Choose a domain name that represents you, your name, mission or raison d'être.

- Make a Plan** — Think about what you want to communicate. What is the main message or takeaway? Is there something specific on your site you want to direct attention to?

**Best practice tip:** Create wireframes of the different pages or sections you want to develop. This helps you think through page elements ahead of time, eliminating any unforeseen obstacles or roadblock for getting your site up and launched.

- Smart Start Strategy** — Depending on how adept you may be at website development, there are beautiful DIY templates available from sites such as Squarespace and GoDaddy or if you're familiar with HTML and coding you can design and customize your site to your liking.

**Best practice tip:** Looking for a middle ground? This is a great opportunity to bring in a freelance designer or web specialist. Many companies specialize on web development and cover everything from copywriting, graphic design, development, SEO and conversion in order to get the most ROI from your new site. Choose which ever time, resource and financial investment is going to be best for you.

- Apply Your Brand to Social Media**

While your website should not be changed that often to maintain consistency of your Personal Brand, your social media pages allow you to relay your message and self-package every day, letting you shape your image or persona consciously. But most importantly, social networks allow brands to grow their visibility. Your online persona becomes a marketing and promotional tool to brand yourself.

**Best practice tip:** Tailor your message to the niche topics your brand occupies to position your brand, and yourself, as an expert in your field. Remember, posting daily drives engagement and strengthens your brand's familiarity with your audience.

- Organize Your Site – There are several elements your site will need to reinforce your brand’s image.**
  - Header: elegant, neat, uncluttered, logo in upper left corner, keep your menu in the same place throughout site
  - Hero Shot: professional photo of yourself
  - Calls to Action: Simple, clear directions to encourage visitors to accomplish the goals of your site
  - Forms: to collect visitor information, encourage registration or collect subscriptions. Request ONLY the information you need and nothing more.
  - Trust Builders: testimonials, awards and nominations, certifications, memberships, samples of work
  - Internal Site Search: so visitors can easily look up information on your site
  - Social Media Buttons: to direct users to channels you would like to share or connect on
  - Footer: Your address, contact email, phone number, etc. for quick access.
  - Additional Elements: portfolio of your clients or previous work, membership access, blog links, features/benefits, etc.
  
- Design Pointers to Consider – Your site needs to be designed with user experience in mind.**
  - Eliminate clutter. Nothing unnecessary should be present no matter how much you like it. If it doesn't serve a purpose for your site's visitors, toss it. It will only serve to clutter your user experience
  - Your content needs to be organized logically in groups.
  - Avoid features that slow your loading time like auto-play videos, complex animations or music. You have less than three seconds before new users get impatient with your site's loading speed.
  - Plan your page from the top down, with high priority information located at the top or can be accessed with minimal scrolling.
  - Select cohesive colors and images.
  - Budget white or blank space. It's pleasing when used in the right spot.
  - Avoid reader fatigue, legible fonts, appropriate font size, narrow lines and ample leading.
  - Uniform page layouts throughout your site will package the whole experience together.

## SHORT & SWEET SEO CHECKLIST

### □ Research keywords in your industry.

You'll use keywords across your website to help tell the search engines what your website is about. Tools like Google Keywords let you research what search terms people are most commonly using so you can ensure you tap into hot topics.

### □ Include a clear title tag and meta-description.

When you look at search results, title tags are the main headline links and meta-descriptions are the short paragraphs underneath them. Title tags should be 50-60 characters long, including spaces. Meta-descriptions can and should be longer – about 145-160 characters (anything longer will likely be truncated by search engines). Don't duplicate title tags as these can be penalized in search. Make your headline (<h1> tag) different from the title tag to vary the keyword phrasing of your page and increase its chances of appearing in different searches.

### □ Add alt text to your images.

Alt text is the description of the image, which search engines use to identify what an image is so they can index it for search results, such as in Google Images.

### □ Include formatted headings and subheadings in all content.

It's not enough to simply bold your headings. Search engines won't identify them as headings unless you make sure they're called out with <h1> or <h2> tags in the page's HTML. Simply use the text formatting drop-down menu when you're creating content. A good rule of thumb is to use a new heading for every 150 words, or about three paragraphs.

### □ Update your site frequently.

Search engines want to know that your website is active and that it will provide current and relevant information for visitors. This explains the popularity of blogs, which provide a way to keep content new and fresh. Include links to other content on your site and around the web.

### □ List your website in directories.

To avoid being invisible online, create listings on several online directories. They help increase your rankings by bumping up the number of backlinks to your website. While there are hundreds of online directories, it's worth doing your due diligence to get listed on the big ones, like Google, Yahoo, Bing, Yelp, YellowPages and TripAdvisor.

## HOW TO MASTER LEAD GENERATION

### □ Create a goal-oriented structure.

Each page's goal should be very clear and easy to act on. It should state exactly what you want the user to do and provide a concise call to action button (links are less effective). Thoughtfully placed fields where users can sign up for a newsletter or promo offer are good. And pop-ups are also an excellent way to encourage engagement. Best practice is to have it fire on the 2nd or 3rd page view or after 1 solid minute on your site.

### □ Highlight case studies and testimonials.

Often customers are more likely to trust a product or service that has been recommended to them by another consumer than they would if the company marketed to them directly. When you've gathered testimonials, make sure not to bury them on a testimonials page. Try adding them to your rotating carousel on your homepage. Or use a site plug-in to add them to other places on all your pages so that users won't miss them.

### □ Create useful resources your customers can download.

Not only does this demonstrate that you're an expert who's willing to share valuable insights, but you can set up download forms for these resources and capture customers' details in the process, allowing you to contact them later with a sales pitch.

### □ Offer a free trial, sales promotion or money-back guarantee

Sometimes latent customers may be lurking around your site looking for a reason to hit 'Buy now'. Tempt cautious buyers by giving them that extra 'something shiny' that nudges them towards a sale.

### □ Limit calls-to-action.

In today's digital age, information overload is a serious risk to customer retention. Decide what action you want your audience to take on a page of your website and give them one single call-to-action – reducing distractions and increasing the chances of a click.

### □ Convert your social media audience.

Some brands have a strong, engaged social media audience who may never have visited the company's website. Running a promotion targeted specifically at Twitter or Facebook followers and offering them special value for being part of your social network can help convert them from followers to customers.



# TIPS FOR CREATING EFFECTIVE LANDING PAGES

*Exactly what your landing page looks like and how much information it contains really depends on the goal for your campaign. While the internet is full of discussions about what landing pages should and shouldn't feature, these are some good general guidelines to follow:*

## **Prioritize simplicity.**

Visual clutter will detract from your message and overwhelm visitors, so make good use of white space. Keep key information above the fold.

## **Write a clear headline and sub-head.**

A good landing page always broadcasts an offer. Use your headline to promote it in a few simple words. Use the sub-head to further explain the offer or share its value proposition.

## **Focus on a single message.**

Most visitors won't spend too much time reading, so make text short and scannable. Ideally, it should be 1-2 short paragraphs of 2-3 sentences only. Here's your chance to demonstrate that you understand your visitors' pain points. You can also use this section to articulate your value proposition.

## **Simplify with bulleted and numbered lists.**

What are the benefits of your offer? Provide 3-4 ways your solution answers visitors' pain points. Alternatively, you should list 3-4 benefits of key product features.

## **Match content to PPC ads.**

Repeat the exact same words and phrases in your PPC ads. This reassures visitors they've come to the right place.

## **Use a single call to action.**

It's good practice to repeat exactly what you want visitors to do when they're on the page—in the copy, as well as on the call to action button. Hopefully, you've kept your landing page short, but if you haven't make sure to place your button above the fold.

## **Keep forms short.**

Do you want to collect your visitors' names, where they work, their phone number, and email address? Or will an email address suffice? Really consider how much information you actually need. The more you require, the less likely visitors will oblige.

# FOUR TIPS TO IMPROVE YOUR MOBILE WEBSITE EXPERIENCE

*Let us help you avoid a mobile faux pas with some foolproof ways to ensure mobile responsiveness and speedy load times to accommodate even the most impatient user.*

## Gain Some Speed

**One of the easiest and most effective ways to speed up page load times is reducing image file sizes:**

Photo size - Try to keep image files sizes to a max of 40KB when possible. You can also look at tools, plugins and photo software to compress or edit image sizes. Imagify is a wonderful plugin that can help you reduce the amount of space your photos use while maintaining the quality of the image. And Affinity Photo offers Photoshop-like tools at a fraction of the price.

## Theme Matters

**The website theme you choose must be compatible with mobile devices. The key word to look for is “responsive.” A responsive theme means when a user lands on your page from a cell phone, for example, your website will still house the same content, but the structure will automatically re-format to optimize the display to accommodate a mobile screen.**

Responsive design – Most templated websites will automatically be formatted for responsive design. Just be sure to flag this as a “must” when you are choosing a theme, researching web designers or talking with a web company.

## Call to Action

**Create calls to action that are concise, direct and easy to spot. Use action words that will prompt your potential customer to move forward in doing business with you. A few great examples are:**

- Sign up now
- Get started
- Learn more
- Join us

## Consider an App

**If you are a mobile-first business consider the benefits of creating your own app. It may not be as difficult as you think. When deciding if you should build an app to complement your website ask yourself the following questions:**

- Do your competitors have apps?
- Will your app solve a customer problem?
- Do you have an ongoing customer loyalty program?
- What tangible benefits would an app provide that aren't offered on the website?

## 5 MARKETING TIPS FOR BUSINESSES ON A BUDGET

*If your small business is looking for some resourceful and efficient ways to drive website traffic on a minimal budget, this is the guide for you. With these five tips, you'll grow your online traffic, boost your sales, and ultimately take your business to the next level.*

### Implement SEO strategies to drive traffic

Support increased SEO rankings for higher results in online and local searches by optimizing your website for SEO and posting new content regularly. While there are plenty of in-depth guides that focus on SEO, here are some of the highlights:

- Review and analyze your competitor's keywords and phrases
- Choose which ones you want to rank for
- Use those keywords and phrases throughout your website (including page titles, headers, page copy, meta tags, etc.)
- Submit your website to search engines and online directories to make sure they start indexing it

### Use content marketing to build trust

There are numerous types of content you can create, including blogs, videos, white papers, ebooks, infographics, case studies, podcasts, and more. The key to success is finding out what works well for your particular niche. While some content can require a lot of research and resources to produce, the time spent can be well worth the effort. Not only will customers be more open to learning about your product or services, they'll also be more eager to start a genuine conversation. Content can be the catalyst for a relationship that reaps long-term rewards.

### Integrate social media to gain a following

Before you jump in and create a profile on every social media website, find out which social networks are popular with your customer base or vertical. Then, post links to your original content, and even helpful articles and content that aren't your own. Other ideas to keep followers engaged include running contests, offering exclusive promotions, posting polls, and posing questions to the community to encourage engagement.

### Bring them back with email marketing

To get good at email, start by testing the approach that works best for your customers. A weekly email can be seen as too much by some customers, while bi-monthly or monthly email works better for others. Your email messages also depend on your audience. If you want to use email to increase sales, test all kinds of campaigns, like holiday sales, limited-time specials, coupons, and first-time customers. And don't forget that email doesn't always have to be about revenue. Sometimes the most effective campaigns are those that simply remind customers that you're there, you're an expert resource, and you're here to help when they're ready.

### Go mobile to boost sales

These days more than half of all internet traffic originates from a mobile device, so if your website isn't mobile-friendly, you're losing out on a huge percentage of customers. Optimize your site to make it easier for mobile customers to navigate and make a purchase.

Here are a few mobile-friendly website features to keep in mind:

- Don't include flash videos.
- Optimize images with the correct sizes.
- Feature larger tap-able buttons. (Embedded links are often too tiny to click with fingers.)
- Make navigation menus manageable. (Large drop-down menus fill the entire screen.)

# SURVIVAL GUIDE TO SOCIAL MEDIA

Deciding the right platforms for your business

## Facebook

**Overview:** One of the most widely adopted social media platforms. It is the most recognized platform and seen as an “all-rounder”, making it a great starting point for a company taking the first steps into social media marketing.

**Why use it:** Facebook allows you to connect one-on-one with your followers, helps you reach large groups, and gives you deeper insights into your audience.

**What to Post:** Be sure to have a mix of fun, educational and promotional posts. Post owned content and well as sharing relevant articles or videos you find across the web. If you don't diversify your posts, Facebook's algorithm will start placing your posts lower in user's feed decreasing your overall reach.

### Tips:

1. Use the cover photo to promote large assets, announcements, or events. The cover photo is typically the first thing a user sees when they visit your Page.
2. Add links to your posts to point to a page on your website. Use Facebook's rich link preview format, which appears when you paste a link in the post text, rather than embedding it within a caption.
3. Remember the 80/20 rule—80% of your updates should be social in nature. Facebook wants to be sure users are engaging with posts in their Newsfeed. If you are regularly posting over promotional content with little to no engagement, your Page's organic distribution to fall over time. Rotate the content you post to keep it fresh and interesting.
4. Schedule posts for when your audience is online. People use Facebook at different points throughout the day and you want to post when your audience is most active. To find this info, check your Facebook Insights data. Click the Insights tab and then click Posts in the left menu to see times and days your audience is engaging with the platform.
5. Share content from other channels. You don't need to rely solely on content you create and publish yourself. Instead share relevant news stories or articles that relate to your business. Your audience will appreciate the variety of information and see your channel as a resource to engage with more frequently

# SURVIVAL GUIDE TO SOCIAL MEDIA

## Twitter

**Overview:** Targeted more for short, high-frequency updates. A Tweet is a short message, 140 characters max. It can include videos and photos, you can prefix your words with hashtags to make them a searchable link. Twitter is a fast-paced platform, with content generally visible for 18 minutes or less. Retweets can add to content's longevity, but the upper limit is still measured in hours, not days.

**Why use it:** Provides large scale reach and a way to quickly spread content and expand your audience. Twitter can also work as an extension of your customer service department, and is a great tool for listening to what your competitors are up to or updates in your industry sector.

**What to post:** Share content that is interesting and relevant - from fun infographics and educational content, to industry news, occasional press releases, and announcements. The 4-1-1 rule states that for every four light and informative content you share, you can have one soft-sell offer and one hard-sell offer, like a demo. The 4-1-1 rule can guide your sharing strategy for many social platforms, not just Twitter.

### Tips:

1. Include a hashtag in every post, and use sources like Hashtagify to research top performing, and similar, category hashtags.
2. Monitor boards for customer issues and respond promptly.
3. Use @Mentions to engage other Twitter users in your tweet. They will get notified after being tagged in your tweet.
4. Keep your tweets short and sweet. Research shows tweets that contain less than 100 characters receive 17% higher engagement than longer ones.

## Pinterest

**Overview:** A virtual scrapbook that allows users to share and organize visual imagery and link to external sites. Very aspirational in tone and good for showing the benefits of long-term purchases.

**Why use it:** Great for travel and tourism, art, design and fashion.

**What to post:** Make sure you are including a good content mix in your Pinterest boards. Followers will want to see a combination of business and culture content.

1. Tips:
2. Use relevant keywords to describe your pins so users can easily find them.
3. Organize your boards around different themes: different product, collections, company culture, inspiration, how-to, etc.
4. Posts can be linked to online content, so use engaging visuals to encourage users to visit your links.

# SURVIVAL GUIDE TO SOCIAL MEDIA

## Instagram

**Overview:** A Facebook owned platform, Instagram is a visual platform that is all about stunning imagery.

**Why use it:** Although a smaller audience, statistically Instagram has the highest engagement rate. Great for designers to showcase fashion, art and architecture; also a huge following for food brands, restaurants and cafes.

**What to post:** Make it visually engaging: Instagram users are savvy and creative, and know lackluster content when they see it. Don't post a photo or video unless it has aesthetic appeal.

1. Tips:
2. Make it exclusive: Post images and videos that can only be seen on Instagram.
3. Make it personal: Post photos and videos that give your audience personal insight into the inner circle or workings of your product or company.
4. Hashtags act as keywords, providing a way for people to find your posts. Include 2-3 hashtags for every image you post.

## LinkedIn

**Overview:** The world's largest professional network on the internet. More corporate in tone, LinkedIn allows you to post a digital CV and network with colleagues, workmates, suppliers and customers.

**Why use it:** Brands create company pages on which to post job ads, company updates and staff stories. LinkedIn is now the way to reach an audience with a business mindset. You can also post job openings on LinkedIn and search candidates, making it a great venue for recruiting talent.

**What to post:** LinkedIn is seen as a professional network, your content mix and tone should aim to be fairly professional and engaging. Content that helps the reader do his or her job more effectively, or adds to the conversation about a crucial topic in an industry generally performs best.

1. Tips:
2. Customize your LinkedIn URL to match your business - Press the "edit profile" button and then click the gear symbol next to your URL. This will take you to a separate page where a "your public profile URL" box will appear with the option to edit the link.
3. Customize your background image. This is your biggest opportunity to brand your page. Make sure to choose a file that is large enough so that it doesn't become stretched or pixelated.
4. LinkedIn doesn't have a built-in spell checker. Check and double-check for any typos!

# PROMOTIONAL MATERIALS YOUR BUSINESS NEEDS

## □ Business cards

No ifs, ands or buts about it—business cards are an absolute must, no matter what your business is. There is no need to spend a ton on fancy cards or a professional logo; sites like Vistaprint make business cards and other promotional materials affordable and accessible to everyone.

## □ Brochures

If you are a business that offers many different types of services that you feel need to be explained to potential customers, then consider brochures. However, since they're pricier, make sure they are a fit for your business and will get good use.

## □ Postcards

A promotional standard, the postcard can be used for more than just mailing. And for many different purposes, such as promotions, sales, and special events.

## □ Swag

Consider items that potential customers could use in their everyday lives, such as pens, magnets, cups, drink holders, bottle openers, etc. Before you shell out cash on these items, think about what will be a good match, and most importantly, if people will actually look at what's on the item. For instance, will they even notice what's on the pen they're writing with?

## □ Signage

Posters, pull-up banners or marquees are larger-scale items that help you decorate your environment with your brand. If you often host or attend events, or you have an office or store space that you want to make more recognizable, signage is a great option on a variety of budgets.

## □ Uniforms & apparel

Deck out your staff with branded clothing to proudly display your logo while they're working or out in the community. Or give them away to customers so they're reminded of your business every time they throw on a t-shirt or hat!



# THE ESSENTIAL YEAR END CHECKLIST FOR BUSINESSES

## Technology

- Backup and secure all data, including data that your employees work with on a daily basis. We recommend using an external hard drive and a cloud-based backup system.
- Backup and secure all contacts for you and your employees. With the potential to lose data during cell phone updates, it is a good rule to backup client information to a cloud on a quarterly basis.

### **Best Practice Tip:**

Website health check - Take an inventory of the services listed on your website. Do they match what you currently offer? If not, make this a priority to change in the New Year!

## Financials

- Flex spending accounts are generally liquidated at the end of each year; therefore, you will want to spend money that is left in your account before December 31.
- Review each employee's hiring forms and make sure you have complete tax and employment information on each employee, including 1099s for your independent contractors.
- Review financial reports and assess net gains and losses. This is the best way to tell where your business stands financially and forecast trends for the following year.
- A new tax season looms with the start of each New Year. Begin getting all of your tax records in order now for either your accountant or yourself.

### **Best Practice Tip:**

Review the benefits and compensation packages you offer employees. These items should be added to your new budget at the beginning of the year.

## Goals

- Gather your top employees for a strategic discussion on what worked and what didn't. They will provide input that you may not have considered.
- Ready to set new goals for your company? Make sure you get next year's goals on paper and communicate them out to your team.

### **Best Practice Tip:**

Examine your staffing needs for the coming year. Do you need to hire more employees or eliminate staff?