Checklist

The Service Business Starter Kit

A launch checklist for a service business, from the paperwork to your first ten clients.

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How to use this kit

This kit is a checklist. Work through it in order the first time, then come back to it whenever something feels messy. Not every line applies to every business: a dog groomer, a cleaning company and a private tutor need different things. Skip what doesn't fit and add what's missing.

Rules differ by country and sometimes by city. Where a line says "check", find out what applies where you work: from your local business authority, an accountant or a lawyer.

1 Decide what you sell

- [ ] Write down the services you will offer, one line each. Start with fewer than you think: three to five is enough to launch.
- [ ] For each service, write what is included and what is not. For example: "Standard clean: kitchen, bathroom, floors, dusting. Not included: inside the oven, windows."
- [ ] Estimate how long each service takes, including setup and cleanup. Time yourself on real jobs as soon as you can and correct the estimate.
- [ ] Decide who you serve: homes, businesses or both, which area, which days and hours.
- [ ] Write one sentence that says what you do and for whom. You will reuse it on your website, your profiles and your invoices.

2 Paperwork and protection

- [ ] Choose a legal form for the business and register it. Check which forms exist where you work and what each one means for tax.
- [ ] Check whether your trade needs a licence, permit, certificate or inspection.
- [ ] Get insurance. Ask a broker what your trade needs. Public liability cover (for damage or injury you cause on a job) is where most service businesses start, because you work in other people's homes and premises.
- [ ] Open a separate bank account for the business. Mixing personal and business money makes every later step harder.
- [ ] Find out how and when you pay tax, and whether you must charge VAT or sales tax.
- [ ] Decide how you will keep the books: an accountant, accounting software, or a spreadsheet you update every week.

- [ ] Move a fixed share of every payment you receive into a separate tax account. Ask your accountant which share fits your situation.
- [ ] Write simple terms of service: what you do, how payment works, how to cancel or reschedule, and what happens if something gets damaged.
- [ ] If you store clients' personal data (names, addresses, phone numbers), check which privacy rules apply. In the EU this is the GDPR: you need a reason to keep the data, you must keep it safe, and you delete it when you no longer need it.

3 Prices and policies

- [ ] Work out your minimum hourly rate from your real costs. Our free guide "How to Price Your Services" walks through the formula.
- [ ] Set a price for every service on your list and write them all down in one place.
- [ ] Set a minimum charge, so a short job far away doesn't lose you money.
- [ ] Decide on a service area, and on a travel charge for anything outside it.
- [ ] Write a cancellation policy: how much notice you need, and what you charge for late cancellations and no-shows.
- [ ] Decide when you take payment: upfront, a deposit, on completion, or monthly for regular clients.
- [ ] Decide which payment methods you accept (card, bank transfer, cash, payment link) and test each one before your first client.

4 Booking and scheduling

- [ ] Choose one place where every booking lives: a calendar, scheduling software or a paper diary. One place, not three.
- [ ] Decide how clients book: by phone, by message, through a form or on an online booking page.
- [ ] Set your working hours and block time for travel between jobs.
- [ ] Leave a buffer between jobs. In the first weeks, jobs almost always run longer than planned.
- [ ] Decide how you confirm a booking and when you send a reminder (the day before suits most services).

- [ ] Write down what you need to know before each job: address, how to get in, parking, pets, special requests.

5 Doing the work

- [ ] Write a checklist for each service, so every job is done the same way, by you now and by the people you hire later.
- [ ] List your equipment and supplies, with where you buy them and what they cost.
- [ ] Decide what “done” looks like and how you check it before you leave: a final walk-through with the client, photos, or a last pass with the checklist.
- [ ] Decide in advance what you do when something goes wrong: a breakage, a delay, a missed spot. Know how you will put it right before it happens.

6 Clients and records

- [ ] Keep one record per client: contact details, address, service history, preferences and notes.
- [ ] Prepare a short list of questions for every new client.
- [ ] Ask before you send marketing messages, and keep a note of who agreed and when.
- [ ] Store access codes and keys securely, and decide who on your team can see them.

7 Invoicing and getting paid

- [ ] Prepare an invoice template with everything your country requires. Check: business details, tax number, invoice number, dates, tax lines.
- [ ] Number invoices in sequence and keep a copy of each one.
- [ ] Set payment terms (for example, due on receipt or within 7 days) and print them on every invoice.
- [ ] Decide what happens when an invoice is late: a friendly reminder after a few days, a phone call after that.
- [ ] Once a week, check which invoices have been paid and which have not.

8 Being found

- [ ] Create a Google Business Profile, plus whatever people in your area use to find local services (Apple Maps, local directories, marketplaces).
- [ ] Make a simple website, even a single page, with: what you do, the area you cover, prices or “from” prices, how to book, and how to reach you.
- [ ] Take good photos of your work. Ask the client first if their home or face is in the picture.
- [ ] Pick one or two social channels you will actually keep up. An abandoned profile looks worse than no profile.
- [ ] Write your business name, address and phone number exactly the same way everywhere.

9 Your first ten clients

- [ ] Tell people you know. Send a short personal message rather than a group post: what you do, where, and how to book.
- [ ] Ask every early client for a review once the job is done, and send a direct link so it takes one tap.
- [ ] Talk to businesses that serve the same people without competing with you (an estate agent for a cleaner, a vet for a dog groomer) and agree to recommend each other.
- [ ] Put your details where your clients already look: local groups, noticeboards, community sites. Follow each place’s rules.
- [ ] Ask every new client how they found you and write it down. After twenty clients you will know where your time is best spent.
- [ ] If the service repeats, book the next visit before you leave.

10 The weekly routine

Once you are up and running, one hour a week keeps the business under control.

- [ ] Look at next week's calendar: gaps, travel, anything not yet confirmed.
- [ ] Send invoices for finished work and follow up on unpaid ones.
- [ ] Update the books and move the tax share into its account.
- [ ] Reply to every review and message.
- [ ] Write down one thing that went wrong this week and how you will prevent it next time.

Before your first paying client

You are ready when you can tick every line below.

- [ ] I know what each service includes and what it costs.
- [ ] I am insured.
- [ ] I know how clients will pay me, and I have tested it.
- [ ] Every booking goes to one place.
- [ ] I have a written checklist for the work.
- [ ] The client knows my cancellation policy before the first visit.

Vorzi

Vorzi is software for service businesses: scheduling, client records, invoicing and team management in one place.

This guide is general information, not legal, tax or financial advice. Rules differ by country, so check the details with a professional where you work.

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