BUSINESS FOUNDATION TEMPLATES & CHECKLISTS

A practical workbook to organize the essential information, systems, responsibilities, and goals every business needs.

PLAN • ORGANIZE • DOCUMENT • OPERATE • GROW

Use this workbook	Complete one copy for your business, then review it quarterly. Store the finished workbook with your legal, financial, marketing, and operating records.

Prepared by Inspirativo Agency

Helping local businesses build, grow, and succeed.

• FOUNDATION 1

Business Identity and Ownership Record

Keep the core facts about the business in one organized place.

Business information	Details
Legal business name	
DBA / public name	
Entity type	
Date established	
State of formation	
EIN / tax ID location	
Business address	
Mailing address	
Main phone	
Main email	
Website	

Owner / decision-maker	Role	Ownership %	Contact

• FOUNDATION 2

Mission, Vision, and Positioning

Define why the business exists and how customers should understand it.

Mission statement

Vision statement

One-sentence business description

Positioning question	Answer
Who do we serve?	
What problem do we solve?	
What result do we help create?	
Why should customers choose us?	
What do we not want to be known for?	

• FOUNDATION 3

Ideal Customer Profile

Build a clear picture of the customers the business is best equipped to serve.

Customer characteristic	Details
Primary customer type	
Location / service area	
Age or life stage	
Business type or industry	
Typical budget	
Main pain points	
Desired outcome	
Buying objections	
How they search for help	
What builds trust	

Focus	A business can serve several customer groups, but marketing becomes clearer when one primary audience is defined first.

• FOUNDATION 4

Products, Services, and Pricing Worksheet

Document what the business sells, how it is delivered, and what it costs.

Offer	Customer problem solved	Price / range	Delivery time	Margin / notes

■ Clear offer name	■ Defined deliverables
■ Price or quoting method	■ Payment schedule
■ Turnaround time	■ Refund / cancellation terms
■ Upsell or add-on	■ Required customer information

• FOUNDATION 5

Brand Consistency Checklist

Create one approved standard for how the business looks, sounds, and presents itself.

■ Approved logo files	■ Primary and secondary colors
■ Approved fonts	■ Business name formatting
■ Tagline or headline	■ Brand voice and tone
■ Photography style	■ Social media profile images
■ Email signature	■ Proposal / estimate template
■ Invoice template	■ Business card
■ Vehicle / uniform branding	■ Website favicon
■ File naming standards	■ Shared brand folder

Brand element	Approved specification / location
Logo folder	
Primary colors	
Fonts	
Brand voice	
Photo guidelines	
Template folder	

• FOUNDATION 6

Customer Contact and Online Presence Tracker

Keep customer-facing contact information accurate across every channel.

Channel	URL / contact	Owner	Login stored?	Last checked
Website				
Google Business Profile				
Apple Maps / Business Connect				
Yelp				
Facebook				
Instagram				
LinkedIn				
YouTube / TikTok				
Email marketing				
Industry directory				

• FOUNDATION 7

Lead and Sales Process Map

Define exactly what happens from the first inquiry to a completed sale.

Stage	Required action	Owner	Target response time	Tool / template
New inquiry				
Qualification				
Consultation / estimate				
Proposal sent				
Follow-up				
Deposit / agreement				
Work scheduled				
Completion / delivery				
Review / referral request				

Response standard	Choose a realistic response-time goal and assign responsibility. Leads are often lost because nobody owns the next step.

• TEMPLATE 1

Business Lead Tracker

Use one source of truth to track inquiries, follow-up, and outcomes.

Date	Lead / company	Source	Need	Value	Next step	Owner	Status

• CHECKLIST 1

Customer Onboarding Checklist

Standardize the handoff after a customer agrees to move forward.

■ Signed agreement or approved proposal	■ Deposit received
■ Customer contact details confirmed	■ Scope and deliverables confirmed
■ Timeline confirmed	■ Required files received
■ Access credentials received securely	■ Decision-makers identified
■ Communication schedule confirmed	■ Change-request process explained
■ Internal team assigned	■ Project folder created
■ Customer welcome message sent	■ Final review / approval process explained

Customer / project	Start date	Project owner	Status / notes

• FOUNDATION 8

Operations and SOP Inventory

Identify the repeatable processes the business needs documented.

Process	Documented?	Owner	Where stored	Next update
Opening / closing				
Customer inquiries				
Estimates / proposals				
Scheduling				
Service delivery				
Quality control				
Purchasing / inventory				
Billing / collections				
Complaints / refunds				
Employee onboarding				
Safety / emergency				
Data backup / security				

• FOUNDATION 9

Financial Organization Checklist

This page is for organization only and is not a substitute for accounting, tax, or legal advice.

■ Business bank account	■ Business credit or debit card
■ Bookkeeping system	■ Chart of accounts
■ Invoice process	■ Receipt storage
■ Expense approval process	■ Sales tax process if applicable
■ Payroll system if applicable	■ Contractor payment records
■ Monthly profit and loss review	■ Cash-flow forecast
■ Tax deadline calendar	■ Emergency reserve goal
■ Insurance coverage review	■ Professional accountant / bookkeeper contact

Monthly financial review	Target / answer
Minimum revenue goal	
Fixed monthly expenses	
Variable monthly expenses	
Break-even point	
Cash reserve target	
Outstanding receivables	
Largest financial risk	

• FOUNDATION 10

Legal, License, Insurance, and Compliance Tracker

Keep renewal dates and important records visible and organized.

Item	Required?	Provider / agency	Expiration / due date	Stored where	Status
Business registration					
DBA / assumed name					
Local license / permit					
Professional license					
General liability insurance					
Workers' compensation					
Commercial auto					
Contracts / terms					
Privacy policy / website terms					
Tax registrations					

• FOUNDATION 11

Account Access and Digital Security Checklist

Do not write passwords directly in this workbook. Record where credentials are securely stored.

■ Password manager in use	■ Unique passwords for critical accounts
■ Two-factor authentication enabled	■ Recovery email and phone current
■ At least two authorized administrators	■ Former employees removed
■ Website backup enabled	■ Cloud files organized
■ Computer security updates current	■ Customer data access limited
■ Secure payment tools used	■ Emergency account recovery plan documented

Critical account	Primary owner	Backup admin	Credential location	2FA?	Last reviewed
Domain / DNS					
Website					
Business email					
Google account					
Social media					
Accounting / payments					
Cloud storage					

• FOUNDATION 12

Team Roles and Responsibility Matrix

Make ownership clear so important tasks do not depend on assumptions.

Responsibility	Primary owner	Backup	Frequency	Standard / notes
Answering leads				
Sales follow-up				
Scheduling				
Customer service				
Service quality				
Purchasing / inventory				
Billing / collections				
Marketing content				
Online reviews				
Bookkeeping				
Compliance renewals				
Technology / security				

• TEMPLATE 2

Monthly Marketing Planner

Plan a manageable mix of visibility, trust, education, and conversion content.

Week	Main message	Content / campaign	Channel	CTA	Owner	Publish date
1						
2						
3						
4						

■ Customer problem	■ Service spotlight
■ Completed work	■ Customer testimonial
■ FAQ / education	■ Team / behind the scenes
■ Offer or promotion	■ Community involvement

• TEMPLATE 3

Monthly Business KPI Dashboard

Track a small number of measures that connect activity to real business performance.

Metric	Goal	Actual	Previous month	Change	Action needed
Revenue					
Gross profit / margin					
New leads					
Qualified leads					
Sales closed					
Conversion rate					
Average sale value					
Repeat customers					
Reviews / rating					
Website inquiries					
Outstanding invoices					
Customer complaints					

• FOUNDATION 13

Business Risk and Continuity Plan

Prepare for disruptions before they become emergencies.

Risk	Likelihood	Impact	Prevention	Response owner	Backup plan
Owner unavailable					
Employee shortage					
Equipment failure					
Website / email outage					
Data loss / cyber incident					
Cash-flow shortage					
Supplier interruption					
Customer complaint / dispute					
Weather / location closure					

• CHECKLIST 2

Quarterly Business Foundation Review

Use this every 90 days to keep the business accurate, organized, and ready to grow.

■ Update legal and contact records	■ Review offers and pricing
■ Review ideal customer profile	■ Check brand consistency
■ Audit website and listings	■ Review lead response times
■ Update sales pipeline	■ Review customer onboarding
■ Update SOPs	■ Review financial performance
■ Check licenses and insurance	■ Review account access and security
■ Confirm team responsibilities	■ Review marketing performance
■ Update business risks	■ Choose next-quarter priorities

Quarterly priority	Owner	Deadline	Success measure	Status

• FINAL PLAN

90-Day Business Foundation Action Plan

Turn unfinished sections into a clear implementation schedule.

Time period	Priority actions	Owner	Deadline	Completed
Days 1-15	Organize legal records, business identity, account access, and customer-facing contact information.			
Days 16-30	Define offers, pricing, ideal customer, positioning, brand standards, and sales process.			
Days 31-60	Document onboarding, operations, financial routines, team responsibilities, and compliance.			
Days 61-90	Launch marketing plan, track KPIs, address risks, and schedule the first quarterly review.			

Need help building the foundation? Inspirativo Agency supports business strategy, websites, Google visibility, branding, content, printing, AI solutions, and organized growth systems.

Book a consultation

914-336-0154 | info@inspirativoagency.com

www.inspirativoagency.com

This workbook is an organizational resource and does not replace professional legal, accounting, tax, insurance, cybersecurity, or human resources advice.