

Process Service Business Startup Checklist

(Courtesy of [the Process Service Center](#))

This business startup checklist includes the most common tasks process servers need to do to get their process service business started. Schedule a completion date for each task and when it is done, check it off. If there are any tasks you won't need to complete, cross them out. Use the notes column to list phone numbers, comments, or other information related to completing the tasks.

Task	Notes	Due Date	Done
Research the process service business idea with Free Tools			<input type="checkbox"/>
Check your state licensing or certification requirements for process servers			<input type="checkbox"/>
Identify your personal goals, i.e. part-time work, growth, etc. Determine your financial goals per year and per month			<input type="checkbox"/>
Sign up for process server training programs			<input type="checkbox"/>
Choose a business structure			<input type="checkbox"/>
Research competitors			<input type="checkbox"/>
Choose a business name			<input type="checkbox"/>
See if the business name is available as a domain name			<input type="checkbox"/>
Register the business name and get a business certificate			<input type="checkbox"/>
Register your business domain name even if you aren't ready to use it yet			<input type="checkbox"/>
Join PROServer List to let government agencies and clients hire you			<input type="checkbox"/>
Choose a location for your business or make space in your home to run it			<input type="checkbox"/>

Task	Notes	Due Date	Done
Have a business phone line installed if you will be working from home or consider getting a Google or similar service number			<input type="checkbox"/>
Get your business listed on Google business listings			<input type="checkbox"/>
Ensure your Internet service is reliable			<input type="checkbox"/>
Get appropriate business insurance for your business, if required by your state or depending on your personal circumstances			<input type="checkbox"/>
Talk to an accountant about your tax obligations and record keeping requirements			<input type="checkbox"/>
Apply for a sales tax number if needed			<input type="checkbox"/>
Apply for an EIN if needed			<input type="checkbox"/>
Inquire about workers compensation insurance and unemployment insurance if you will be hiring employees			<input type="checkbox"/>
Open a bank account in the business name			<input type="checkbox"/>
Set up an accounting system or accounting software for the business			<input type="checkbox"/>
Setup your funding and create a budget for starting the business			<input type="checkbox"/>
Have a logo created			<input type="checkbox"/>
Order business cards, envelopes and stationery for the business. Alternately, print them yourself, if you have the capability.			<input type="checkbox"/>
Order business checks with the name imprinted			<input type="checkbox"/>
Purchase needed equipment and supplies (printer, copier, fax machine, copy paper, etc)			<input type="checkbox"/>

Task	Notes	Due Date	Done
Find a website hosting company and set up your site			<input type="checkbox"/>
Set up a business email address (preferably using the business domain name)			<input type="checkbox"/>
Set up social media pages for the business			<input type="checkbox"/>
Start building a permission-based customer email list for newsletters and promotions			<input type="checkbox"/>
Prepare brochures, fliers and other handouts. Print or order a small quantity to promote your business opening			<input type="checkbox"/>
Decide where and how to advertise your business			<input type="checkbox"/>
Contact friends, family and acquaintances and let them know you've started your business			<input type="checkbox"/>
Plan and implement low-cost business promotion tactics to market your business			<input type="checkbox"/>
Other:			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>