



MASTERING SYSTEMS: START-UP PLANNING WORKSHEET

13 Things You Need to Have for Your Brand/Small Biz

The goal here is to beat overwhelm, get your business flowing from top to bottom, and allow software systems to help you take a load off. Below are the primary (and I'd argue, *non-negotiable*) things you need to have for your brand/business. They might feel like more work initially, but they will save you countless hours and crazy headaches in the long run.

I've listed my recommendations for each category in gray, which happen to be the ones I'm currently using! That being said, you must find *your* perfect fit for *your* business. We all have our preferences, nuances and specific needs. Here we go...

- 1) **Email Marketing Provider** (recommended - MailChimp, Convertkit, Aweber, etc.):
- 2) **Client Management System & Bookkeeping** (recommended - Dubsado; Honeybooks; Wave):
- 3) **Website/Blogging Platform** (recommended - Wordpress, Squarespace):
- 4) **Hosting Service** (recommended - inMotion Hosting, BlueHost):
- 5) **Project Management Platform** (recommended - Trello or Asana):
- 6) **Primary Social Media Channels (3-5)** (Instagram, Facebook, Twitter, Pinterest):

- 7) **Social Media Scheduling Apps** (recommended - Planoly, Hootsuite, Edgar, Buffer):

- 8) **2-3 Industry Experts You Subscribe to for Further Mentoring/Resources, etc.**
(recommended - Hey, Sweet Pea, Neesha Woolery, Melissa Griffin, etc.):

- 9) **~3 Facebook Groups You're a Part of for Community, Biz Ops, & Resources**
(depends on your industry and interests):

- 10) **Business Networking & Collaboration Groups** (recommended - Flock & Co.; Hello Hustle, Business Networking International, etc.):

- 11) **Calendar (type) & Scheduling Program** (recommended - Bando Agendas, Google calendar, Calendly):

- 12) **Graphic Design &/or Typography Program** (recommended - Canva for Work, Adobe Illustrator or Photo Shop, etc.):

- 13) **Brand Photographer** (I'm happy to make recommendations based on your location and style preferences!):

- 14) ***Bonus: Webinar Platform &/or Course Design Program (if desired & applicable):**

Interested in some more 1v1 consulting to help you sort this all out & get up to speed?

Contact me at connect@kaitlynhiltz.com and we'll do just that!

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