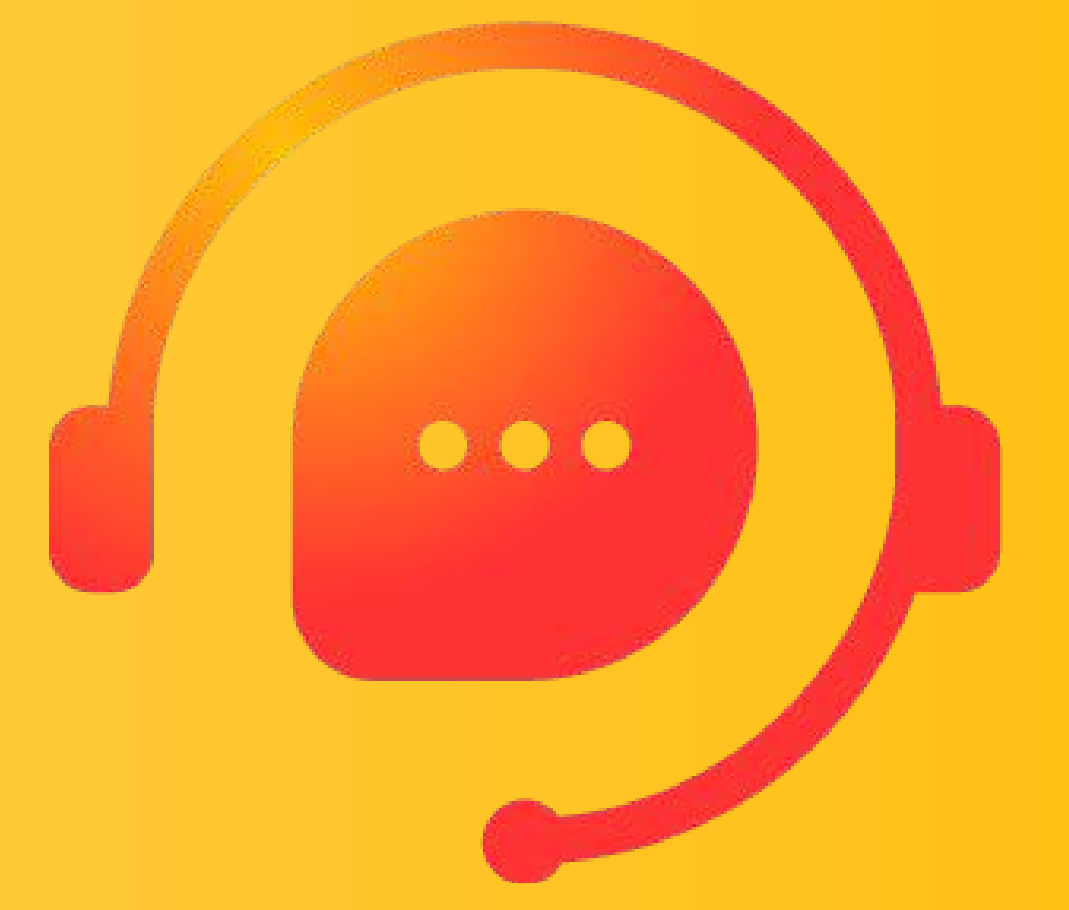
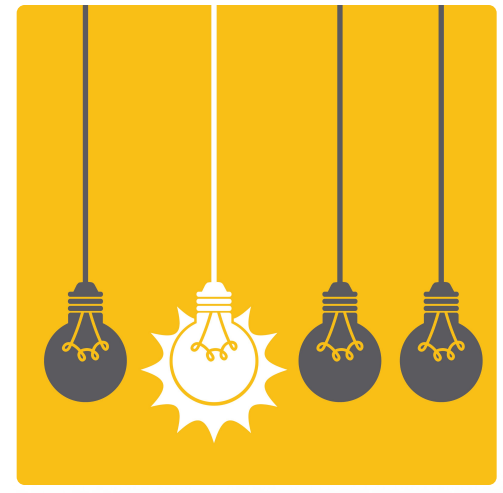




New TC Biz Checklist

☐ 1-Decide your TC Biz Name



Brainstorm catchy and memorable options.
Ensure the name reflects your personality and the brand vibe you want to convey
Use this space to brainstorm!

☐ 2 - Decide your business structure

- ☐ LLC
- ☐ Sole proprietorship
- ☐ S-Corp

☐ 3 - Set up Business Banking and Accounting System

- ☐ Get your EIN Number for free in the [IRS website](#)
- ☐ Open a business bank account.
- ☐ Set up an accounting system to track income and expenses. Consider using software like QuickBooks, Freshbooks or Wave App. **(This will help with invoicing!)**

☐ 4 - Set Up a Professional Email Address



I recommend purchasing a domain and setting up a branded email address to enhance professionalism and brand consistency. As an alternative, if securing a domain isn't feasible at the moment, use a regular Gmail account with a name as close as possible to your business name.

☐ 5 - Decide what services you will provide (remember to follow your State and Broker's rules)

- ☐ Transaction Coordination
- ☐ Listing Coordination
- ☐ Compliance Only
- ☐ Marketing for Listings/Agents
- ☐ Offer Writing for buyer's agents

☐ 6 - Price your services

Ensure your pricing is competitive with the market and based on the type of support you offer.

Type of Service	Price
	\$
	\$
	\$
	\$
	\$
	\$

☐ 7 - Create email templates and Checklists (this will save you a lot of time!)

You will find that this type of activity can become very repetitive, so take advantage of it, and create assets that will help you develop a very structured and duplicatable system in place. This will ensure you provide the same level of service to all your clients, become more efficient and reduce errors.



☐ 8 - Set up a Task Management Software to help you manage transactions (see some examples below)

Consider using:

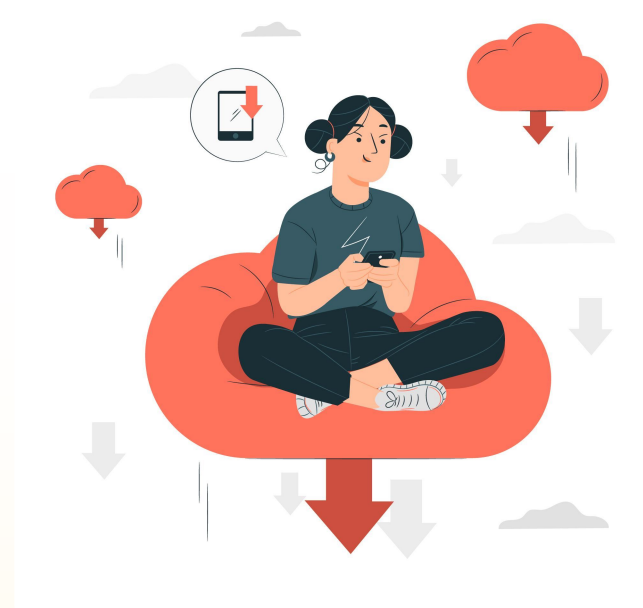
- ☐ Open to Close
- ☐ TC Docs
- ☐ Aframe
- ☐ Listedkit
- ☐ Simple spreadsheet is also an option!



Make sure you educate yourself before making a decision. Not every software or subscription will be suitable for you and your business. Take advantage of demos and free trials. Base your decision not just on what other TCs are using, but on what will best support your operations. Consider features, price, and ease of use.

☐ 9 - Set Up a Cloud Storage Service

A cloud storage service is essential for securely storing and managing your files online, ensuring they are easily accessible from anywhere. Choose a reliable provider that offers ample storage space, robust security features, and seamless integration with your other tools. This will allow you to store important documents, share files with clients and team members, and back up your data efficiently. Popular options include Google Drive, Dropbox, and Microsoft OneDrive. Evaluate your needs and select a service that provides the right balance of features and cost-effectiveness for your business.



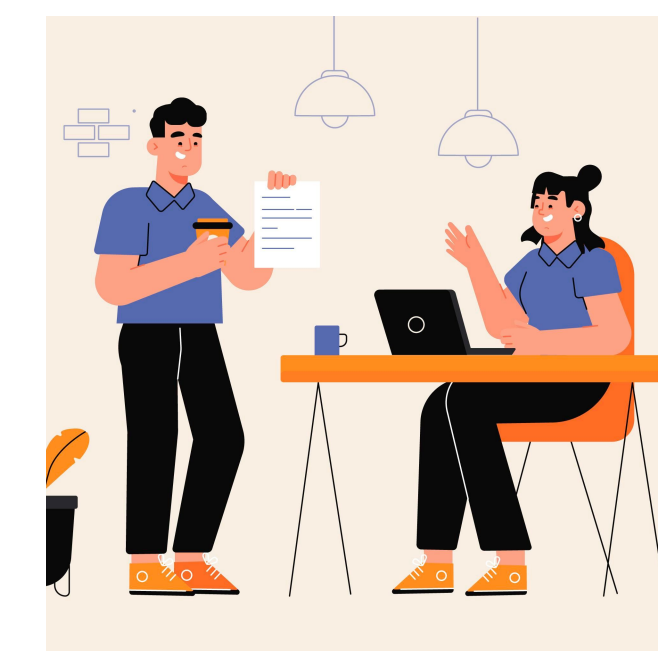
10 - Set Up Scheduling Tools for Discovery Calls



Using a scheduling tool is essential for efficiently managing discovery calls with potential clients. These tools help you automate appointment booking, manage your availability, and send reminders, streamlining the process and reducing the administrative burden. This ensures that you can focus on having productive conversations with prospective clients. Calendly is one popular option that integrates with your calendar and simplifies the scheduling process. Explore various scheduling tools to find the one that best fits your needs and helps you maintain an organized and professional approach to client interactions.

11 - Create a System for Client Onboarding

Your goal is to get clients, but you also want a system in place to welcome them in a professional, structured, and well-organized way. This will minimize back-and-forth communication and help you start servicing your clients immediately. You can accomplish this by utilizing tools like Google Forms, or [Jotform](#) for example (both free tools!).



12 - Create Intake Forms for new transactions



The same concept discussed for client onboarding applies to the intake process for new transactions. Without a system in place and a clear understanding of what you need from your clients from the start, opening a file will take a long time, leading to inefficiency and potential frustration for your clients.

13 - Get a TC Agreement to share with your clients.

- ☐ Have a legally binding agreement in place that outlines your services, pricing, and terms of engagement. Consult a legal professional to draft this.
- ☐ Another option is to buy a Legal Template. I have bought mine here: [Affiliate link](#)

14 - Get Errors and Omission Insurance

Errors and omissions (E&O) insurance protects you from financial losses resulting from mistakes or negligence in your professional services. It's essential for safeguarding your business and maintaining client trust.

- ☐ Research different providers to find coverage that fits your needs and budget. Consider factors such as coverage limits, policy terms, and customer reviews.
- ☐ Consult with an insurance broker or agent who specializes in professional liability insurance to ensure you get the best policy for your specific situation.



Insurance Company	Coverage	Quote
		\$
		\$
		\$
		\$
		\$

☐ **15 - Create your brand board**

- ☐ Colors
- ☐ Fonts
- ☐ Logo

Having a consistent brand will help you when creating marketing materials and will make the process easier. Utilize free tools like [Canva](#) to start creating.

☐ **16 - Create a Professional Website**

- ☐ Square Space
- ☐ Wix
- ☐ Wordpress
- ☐ Canva free website

☐ **17 - Market your services**

With your brand in mind, start creating marketing materials and promoting your services. This is a crucial part of your business, so find a method that is effective and suits your personality, ensuring you stay committed. Some people prefer social media, networking events, cold calling, or paid ads. Whatever method you choose, remember that marketing is an ongoing activity. It's important to continually promote your services, even if you're fully booked.



Which marketing method are you going to commit to?

**Launch your
TC business
with ease and a
system-based
plan**

[Coordination Virtual Playbook](#)

[Visit Our Website](#)

