



Pre-Opening Task List

Step	Task	Time Prior to Opening Date (in weeks)	Completed Date
1	Solidify Funding (business plan, equipment list, real estate needs): http://www.sba.gov/	This step is the longest. Be patient, do it right. Work with a Mentor or Business Consultant.	
NOTE:	VENDORS TO CONTACT: Equipment, Marketing, Signage, Training, Supplies/Inventory, POS Equipment, Credit Card Services, Uniforms, Utilities, Insurance, Payroll, Contractor		
2	Secure Real Estate Site (have lease reviewed by your Attorney) http://www.prepaidlegal.com/		
3	Hire an accountant/bookkeeper for Payroll and Accounts Payable. http://www.myprofitkeeper.com/	24 Weeks	
4	Apply for Federal Identification Number: http://www.irs.gov/businesses/small/article/0,,id=98350_00.html	24 Weeks	
5	Apply for State Master business license (contact your state department of licensing).	24 Weeks	
6	Set up Business Bank Accounts (look for banks with no fee banking for businesses - they can also process your credit cards): https://www.chase.com/Chase.html	24 Weeks	
7	Contact State Labor Department to set up Unemployment Insurance and Worker's Comp. http://www.dol.gov/esa/contacts/state_of.htm	24 Weeks	
8	Begin looking into Business Owners Insurance Policies: https://www.statefarm.com/	24 Weeks	
9	Hire a local architect for plan design.	24 Weeks	
10	Approve and finalize plans - acquire the necessary permits to build or remodel your location (some contractors will handle this part for you).	20 Weeks	
11	Sign contract with licensed and bonded contractor. See the SBSK Contractor Checklist for more information.	19 Weeks	
12	Review equipment list and get estimates from at least three vendors.	18 Weeks	
13	Set Up Utility Accounts (Power, Phone, Water, Garbage)	12 Weeks	
14	Work with local print shop to order a "Coming Soon" banner.	12 Weeks	
15	Order outside signage (get estimates from at least three vendors).	8 Weeks	
16	Recruit and select management (unless you can afford a recruiter, complete this step yourself). Utilize the SBSK Manager Interview	8 Weeks	
17	Review your Training Program - adjust as needed for number of staff to be trained (work with SBSK to develop your Training Program).	8 Weeks	
18	Order POS Systems and Credit Card Machine.	8 Weeks	
19	Contact a local marketing professional to determine Marketing needs (see marketing section of this manual for contact information).	8 Weeks	
20	Confirm Set Up of Distribution Accounts (if inventory is required).	6 Weeks	
21	Begin Hiring Team Members. Utilize the SBSK Interview and Orientation Process.	4 Weeks	
22	Order Uniforms (if required).	4 Weeks	
23	Set up appropriate training schedule for team members. (Work with SBSK to develop your Training Program).	4 Weeks	
24	Verify Refuse Schedule	2 Weeks	
25	Hold a group Orientation for all new employees. Utilize the SBSK Interview and Orientation Process.	2 Weeks	
26	Install and Test Exterior Signage, POS Systems and all Equipment.	2 Weeks	
28	Schedule Delivery of Opening Order - Receive and store inventory (if inventory is required for business).	1 Week	
29	Schedule Final Inspections - Receive Certificate of Occupancy	1 Week	
31	Final fine-tuned clean up of location.	6 Days	



Grand Opening Agenda

Day 1	With Team Members: Initial setup and organization. Review all Standard Operating Procedures (work with SBSK to develop your SOP Manual). Review the Training Program and all expectations for each position in your business.	
Day 2	First Day of Training: (Your Training Program Here) Opening and Closing Shifts. End of day- evaluate progress and plan for Day 3.	
Day 3	Second Day of Training: (Your Training Program Here) Opening and Closing Shifts. End of day- evaluate progress and plan for Day 4.	
Day 4	Grand Opening!	