

## KNOW YOUR NICHE

- ☐ What does your company do? (i.e. boat tours, surf camp, city walking tour, etc)
- ☐ Who is this for? (what demographic makes up your customer base?)
- ☐ Why is it valuable? What makes it engaging?

## DEFINE YOUR APPROACH

- ☐ Who operates the tour/activity? (i.e. solo lead or teams)
- ☐ Where does it take place? Why?
- ☐ Are there time constraints or other limiting factors?
- ☐ What's your legal business structure? (i.e. sole proprietorship, partnership)

## WHAT ARE THE REQUIREMENTS?

- ☐ What are the legal requirements?
- ☐ Register your business with the government.
- ☐ Register with the appropriate revenue agency or taxation authority.
- ☐ Are there required certifications? Do you have them?
- ☐ Look into any required additional training.
- ☐ Obtain professional legal advice.
- ☐ Complete market research and analyses.

## WRITE YOUR BUSINESS AND FINANCIAL PLANS

- ☐ Assess the need for professional advisers to assist with the planning.
- ☐ Draft all key sections, compiling financial projections, related appendices, and a summary.
- ☐ Get an outside or professional assessment of the drafts.
- ☐ Fine tune and edit, until a final draft has been created.
- ☐ Review the final draft. Is it interesting? Well presented? Does it need more work?
- ☐ Consider the key questions that will be asked upon reading the plan.
- ☐ Anticipate the reactions, including objections.

## BUILD YOUR TEAM

- ☐ Can you commit to hiring employees? If so, how many?
- ☐ What are the base requirements for employee salary and benefits locally?
- ☐ Will hiring freelancers be a better option for now?

## SET UP SHOP

- ☐ Secure a good office location.
- ☐ Purchase an insurance policy.
- ☐ Set up the clerical details (i.e. billing and payment systems, company email, phones.)
- ☐ Who is responding to your ads? Tweak your targeting accordingly so your ads are only shown to the group of people who are engaging with them.

## SELECT YOUR TECHNOLOGY

- ☐ Purchase your point-of-sale (POS) system.
- ☐ Purchase your customer relationship management (CRM) system.
- ☐ Look into security, privacy, and storage features.
- ☐ Consider an all-inclusive software like TrekkSoft.
- ☐ Build your website.

## ADDITIONAL KNOWLEDGE

- ☐ Look into relevant research that could fill informational gaps.
- ☐ Could learning an additional language be of use?
- ☐ Consider courses that could add benefits to the way you conduct a tour (i.e. photography, cooking, etc.)