



STARTUP *Essentials*
CHECKLIST



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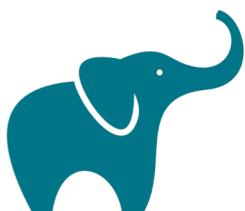
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JO SELF

Coaching Essentials Checklist —

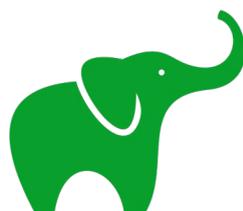
How do you eat an elephant? One bite at a time



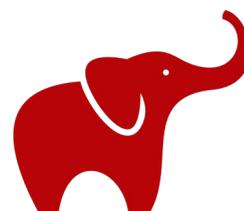
CLARITY



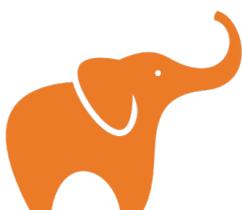
MINDSET



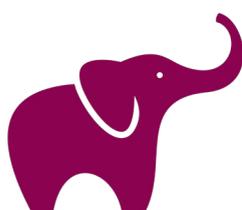
NITTY GRITTY



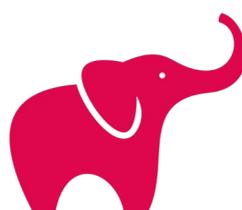
PROCESS



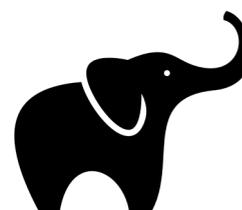
MARKETING



CLIENT
CONNECTION



SELF-CARE



TOOLS

Starting out in business is tough, especially when you're doing it on your own. And if you don't have a roadmap - or at least a solid checklist - you're bound to make a few unnecessary mistakes.

Make mistakes? Absolutely. But make the right ones. The ones that move you forward, teach you something, or open unexpected doors. Not the ones that make you question your worth or wonder if you should've just stayed at that 9-to-5.

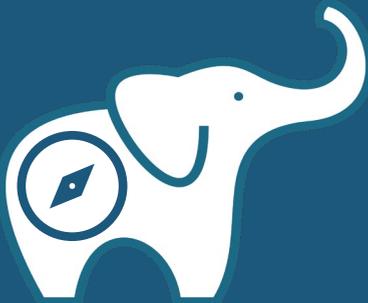
Too many marketing "experts" treat independent service providers like we're mini-corporations. Spoiler alert: what works for Starbucks probably won't work for you.

This checklist should help guide you one step further on your journey.

Just... take the first step!

Here's to putting your
best foot forward





G8Ç-ZA v M6

"I don't know where to start."

Looks like:

- Spinning in circles with ideas
- Unsure who you serve or what to offer
- Trying to 'build everything at once'

Quick Reframe:

You don't need to know everything. You just need to start somewhere aligned.

know your strengths

what sets you apart from the rest?

know your brand

who are you? why do you do what you do?

know your audience

*who needs you? who inspires you?
who do you relate to?*

know your value

*certificates. education. experience.
people aren't buying your time, they're
buying what you know*

know where you work

locally. regionally. globally. online.

embrace growth

believe in your ability to learn and grow

be resilient

*Roll with the punches in your solopreneur
journey*

welcome risk

*Don't fear uncertainty; see it as an
opportunity.*

money is good

Have a healthy relationship with money

passion & purpose

*Connect with your values and purpose to
create value for others*



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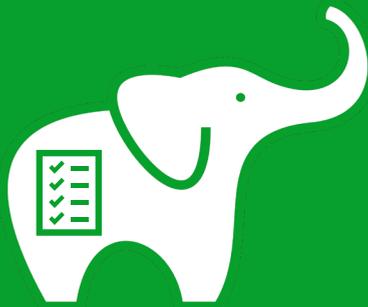
"I'm not ready. I'm not legit. What if I fail?"

Looks like:

- Impostor syndrome
- Fear of charging money or being visible
- Overthinking every move

Quick Reframe:

Confidence isn't required to start.
Momentum builds confidence.



N M I C O G V M I C O

“Admin, taxes, and biz structure make me want to cry.”

Looks like:

- Avoiding bank accounts, contracts, or payment systems
- No clue about business entities or expenses
- Procrastination dressed as ‘research’

Quick Reframe:

You can make progress without mastering bureaucracy. Start with simple systems.

insurance

who, what, when where, how

business setup

structure, contracts, license, trademarks

payments

bank account, online options, plans, discounts

tools

emails, scheduling, payments, CRM, etc

taxes

consider this when looking at your business structure

expenses

consider a dedicated bank account and credit/debit card for easy tracking

packages

simple. minimal. one thing. your clients need simplicity.

client management

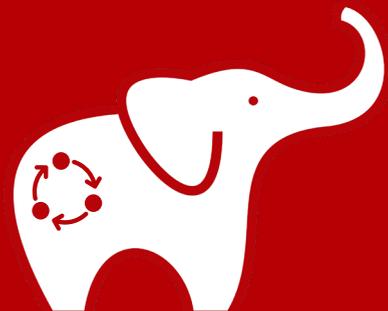
keeping track... what systems do you have?

forms

intake. surveys. testimonials.

testimonials

ask for them. social proof is a must.



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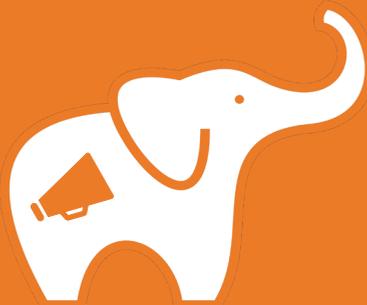
“I’m dropping balls and making it up as I go.”

Looks like:

- No repeatable client onboarding
- Scrambling for forms or follow-up
- No system for tracking progress

Quick Reframe:

A basic checklist or one-page flow is better than a system you’ll never use.



MARKETING

"I hate selling myself and don't want to sound fake."

Looks like:

- Stuck rewriting your bio for the 37th time
- Constantly changing your niche
- Ghosting social media because you don't know what to post

Quick Reframe:

Speak from your values, not from a formula. Your people want *you*, not a pitch.

insurance

who, what, when where, how

website

you don't necessarily need one... yet!

materials

business cards, marketing materials, logos

message

You are your lead magnet! connect to you first.

social profiles

this plays a significant role in your SEO and does the job before you have a website

client attraction

create cornerstone content. rule of thumb is 20% content, 80% repetition.

email

email host, funnels, frequency

digital platform

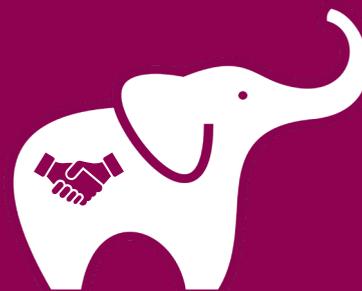
groups, slack, discord, virtual meetings

old school

good old snail mail or a phone call

personal touch

little gifts, recognition, certificates, holidays, birthdays



CONSISTENCY - FREEDETANGLER

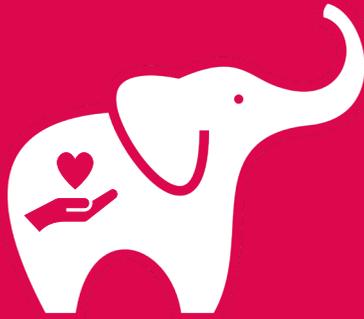
"I got a few clients... now what?"

Looks like:

- Struggling with retention
- No follow-up or engagement system
- Feeling scattered in how you support or communicate

Quick Reframe:

Consistency and a few thoughtful touches go further than a polished pipeline.



Z8ZE7-GAV8

"I'm exhausted, overwhelmed, or sliding into burnout."

Looks like:

- No time to rest, reset, or celebrate
- Forgetting why you started
- Resentment creeping in

Quick Reframe:

Your energy *is* your business. Build around how you work best, not just what you offer.

take YOU time

It isn't selfish, it's smart

sweat out the stress

never underestimate the power of exercise

feed your body

And your soul

laughter is the best medicine

laugh. giggle. embrace the funny.

email

my favorite is [mailchimp](#)

payments

I use [paypal](#), local options may vary

scheduling

[calendly](#) is good and economic

crm

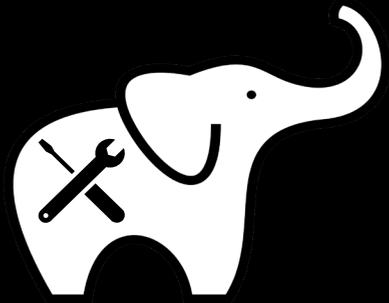
[hubspot](#) is a good place to start until you know what you need

online meetings

[zoom](#) is good to start at the lowest level

communication

alternatives to email like voxer or whatsapp



Qf f Zz

"What tech & tools do I actually need?!"

Looks like:

- Subscribed to 17 things you never use
- Drowning in options (Notion? ClickUp? Trello? GAH!)
- Paralysis because you don't know what's "right"

Quick Reframe:

Free > Familiar > Functional. You can evolve later.



Jo Self

Gallup Certified Coach

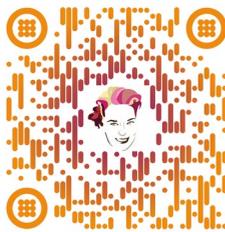
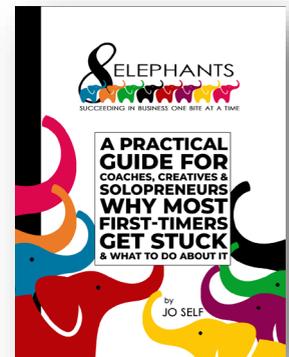
Gallup Licensed Author, Practical Strengths

Strategic | Activator | Maximizer | Communication | Ideation
WOO | Arranger | Connectedness | Command | Positivity

I dream of living in a world where talents aren't wasted, potentials are realized, and happiness is contagious. As the author of the Gallup Licensed Practical Strengths book series, I am determined to teach the 34 talents of CliftonStrengths® as a 2nd language, believing that a common language which celebrates differences as advantages will bring communities together and positively power them forward.

While I do work with many global companies, my passion lies in helping entrepreneurs get off the ground and making money as quickly as possible. I made over \$15,000 worth of mistakes along this 16 yr journey of mine, and if I can help you avoid making the same mistakes, then all the better. You'll still make some mistakes, you'll just make ones that propel you forward instead of setting you back.

8 Elephants [Purchase the full book and journal on Amazon.](#) Check your local Amazon for listing. Otherwise, you may purchase from Amazon.com.



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Parenting, Career Success, and Communication Styles.

Upcoming titles include:

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