

# CHW Training Academy Start Up Checklist

*Use this checklist to get your CHW Training Academy up and running!*

## KNOW BEFORE YOU START

- ☐ Identify your “why” and work on mindset your CEO mindset
- ☐ Learn about CHWs and research the CHW Profession
- ☐ Research the CHW training requirements in your state
- ☐ Identify CHW support organizations you can partner with
- ☐ Identify your knowledge, skills, passions, and purpose
- ☐ Recognize and understand your ideal learner
- ☐ Become a thought leader in your field and specialty
- ☐ Create or find a training curriculum
- ☐ Create documentation and recordkeeping protocols
- ☐ Make a list of things you need to get started
- ☐ Define your target industry and target audience
- ☐ Define your ideal client/learner
- ☐ Finalize your services and initial training programs/solutions
- ☐ Validate your ideas with others, adjust accordingly

## SETTING UP YOUR BUSINESS

- ☐ Decide on a legal structure
- ☐ Register your business with your state
- ☐ Obtain a Federal Tax ID number
- ☐ Obtain a State Tax ID number
- ☐ Apply for applicable business licenses, permits, etc.
- ☐ Develop a business plan or a business model canvas
- ☐ Set business goals and objectives
- ☐ Open a business bank account
- ☐ Secure start-up capital (funding)
- ☐ Obtain business insurance
- ☐ Perform a SWOT Analysis
- ☐ Set some SMART business goals
- ☐ Get a Business Mentor!

## GETTING STARTED

- ☐ Purchase domain names and vanity URLs you might need in the future
  - ☐ Get your website up and running
  - ☐ Secure your social media pages
  - ☐ Sign up for email marketing software
  - ☐ Get a professional business email
  - ☐ Apply for state approval or licensure, if applicable
  - ☐ Obtain accreditation for your training Academy, if applicable
  - ☐ Develop relationships with 3-5 potential partners/stakeholders
  - ☐ Develop relationships with 3-5 potential clients/learners
  - ☐ Create a wish list of things you would like to obtain or purchase at some point
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## MARKETING AND BRANDING

- ☐ Prepare for networking (business cards, letterheads, brochures, etc.).
  - ☐ Practice and finetune your elevator pitch
  - ☐ Host a free workshop, “give your gifts away” and start building your email list
  - ☐ Offer a free training to your partners/stakeholders
  - ☐ Post social media graphics as often as you feel comfortable, just be consistent
  - ☐ Create a “freebie” (shareable content) as a lead magnet for those that might be interested in your trainings.
  - ☐ How else will you market? \_\_\_\_\_
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## GETTING READY TO OPERATE

- ☐ Secure business location and set up appropriate office equipment
- ☐ If working from home office, purchase minimum equipment needed (laptop/desktop, webcam, printer, reliable internet/WIFI)
- ☐ Secure business technology (software and applications, business phone line, payment processors, etc.)
- ☐ Identify staffing needs. Successful programs have at least one director, instructor, and assistant.
- ☐ Recruit, interview, hire, and train staff and contractors

- ☐ Secure business location
  - ☐ Develop your client onboarding process
  - ☐ Develop your learner enrollment process
  - ☐ Market to and recruit students for trainings
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## **SUSTAINING YOUR TRAINING ACADEMY**

- ☐ Invest in additional business tools and systems as you scale
  - ☐ Keep track of strategies that worked and those that did not (create an ongoing lessons learned document)
  - ☐ Ask for referrals and testimonials to build business credibility
  - ☐ Maintain and nurture your repeat business! It costs 80% less to maintain a current client than to get a new one. Also, word of mouth is still the best way to market your business and make money so take care of the clients you already have.
  - ☐ Don't be afraid to change up your processes. If you find a shorter, more efficient, less stressful process, implement it for 90 days and test it out.
  - ☐ Create standard operating procedures (SOPs) for all commonly performed tasks and functions (organizational procedures, staffing onboarding and offboarding, client/student engagement, reporting and recordkeeping, etc.).
  - ☐ Record your workflow processes into short video tutorials so you can use them to onboard new staff and contractors
  - ☐ Remember to take out approximately 30% of wages earned for small business taxes
  - ☐ Hire an accountant to provide oversight of financial records or perform monthly bookkeeping
  - ☐ Hire a lawyer as needed to assist with contract development and other legal issues
  - ☐ Continue to monitor your business goals monthly, quarterly, and annually and adjust as needed
  - ☐ Organize and store all documents in a safe place that can easily be retrieved
  - ☐ Save everything! Start creating scripts and templates of all everything that you use including that you frequently use. Archive old curricula to refer to it later.
  - ☐ Develop contingency plans in the event that you are ill or away from the office
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## **OTHER CONSIDERATIONS FOR SUSTAINABILITY**

- ☐ Create other services and products that complement your training programs and will generate revenue
- ☐ Apply for grant funding or partner with stakeholders that have grant funding