



*Felicia Brown*  
Business, Marketing & Life Coach



MASSAGE, SPA, & WELLNESS BUSINESS

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# Start Up Checklist

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# Determine Concept & General Design or Theme

## KNOWING YOUR WHY

Your Story

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Your Passion

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Your Vision

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Your Philosophy

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## DEFINING YOUR WHAT

Services

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Products Selection

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## UNDERSTANDING YOUR WHO

Target Market & Pricing

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Dream Team Definition

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## CREATING THE WHERE

Name, Logo, & Images

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Service Mark for Business Name & Logo

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Trademark (for Products)

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U.S. Trademark Office: [www.uspto.gov](http://www.uspto.gov)

What's the difference between service marks, trademarks, and patents? [www.uspto.gov/web/offices/pac/doc/general/whatis.htm](http://www.uspto.gov/web/offices/pac/doc/general/whatis.htm)

Secure Domain name(s) for Website

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Secure domain name(s): [www.godaddy.com](http://www.godaddy.com)

Hire graphic designer for logo, website, other marketing materials

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Location & Atmosphere

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Overall Décor, Colors, & Theme

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## DETERMINING THE HOW

Set Initial Goals & Timeline

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Talk with Similar Professionals, Mentors, or Coaches

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# Create Business Plan, Financials, & Budget

## INITIAL FINANCIAL PLAN

Financial Goals

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Expectations

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Start-Up Costs

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Income Projections

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# Monthly Budget Sheet Example

INCOME			
DATE	SOURCE	CATEGORY	AMOUNT

BILLS & FIXED EXPENSES		
DATE	SOURCE	AMOUNT

VARIABLE EXPENSES		
DATE	SOURCE	AMOUNT

SUMMARY	
SOURCE	AMOUNT
INCOME	
BILLS & FIXED EXPENSES	
VARIABLE EXPENSES	
BALANCE	

## CONTINUING FINANCIAL PLANNING

Contact Financial Advisor or Accountant to Write Financials

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Hire consultant to oversee start-up process

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Contact Banker or Funding Partners for Investment or Loan

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Gather Personal Financial Information, Tax Returns, Etc.

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## NOTES

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# Find Location

CONSIDER THESE FACTORS WHEN FINDING YOUR LOCATION

Access, Visibility, & Traffic Flow

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Parking

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Safety

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Close or convenient proximity to target market(s)

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Signage

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Neighbors & Local Resources/services

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## ISSUES TO DISCUSS FOR LEASING

Initial Lease Rate/Lease Term

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Future Lease Renewals

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Option to purchase the property (first right of refusal)

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Landlord allowances for build-out (free or reduced rent, etc.)

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Who are the neighbors, and what do they do? Are there any issues that could interfere with your business? (parking overload, noise problems, controversial business, etc.)

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What is included in the rent? (utilities, cleaning, etc.)

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What additional fees apply? (repairs, CAM, taxes, maintenance)

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Who is responsible for interior repairs? Exterior repairs? Lawn maintenance? Painting the exterior? Maintaining the roof?

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What are the limitations for signage or building changes?

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Will the landlord contribute to up-fit/improvements you make?

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How is the rent to be paid – where/when?

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What are the deposits required?

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Pre-move in inspections and repairs/cleaning

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Lease assignability

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Who has control of heat/air?

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Past tenants of space – why did they leave?

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## NOTES

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# Letter of Intent on Property

A Letter of Intent determines the terms for the lease or purchase and secures the property from other buyers or renters

A statement from your side stating your intent to lease or purchase the space

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A brief description of your business including the business model, different business activities, and a small history about the start date.

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A brief description of the markets where you sell your products or deliver your services.

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The equipment and machinery that you will keep and use in the rented space.

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Your business hours and any plans to change it in the near future.

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Your contact details and the best possible place for further meetings.

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# Negotiate Lease or Purchase

Attorney Review Lease

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Have A/C , roof, electrical, plumbing inspected

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Determine potential repairs and up-fits (carpet, paint, fixtures) before taking occupancy

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Property insurance requirements

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Payment details, location, method and date

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Sign lease or contract

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Other details (equipment purchase, cleaning, air ducts/vents, trash removal)

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# Construction/Design

## ARCHITECT AND INTERIOR DESIGNER

- Make sure these people are familiar with the spa business, flow of services, and special needs for the types of services and/or volume of business you intend to have

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## GENERAL CONTRACTOR

- Painter

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- Plumber

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- Electrician

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- HVAC (Heating & Air)

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- General Construction (Dry wall/other buildings and repairs)

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# APPLY FOR REQUIRED LICENSES, PERMITS, ETC.

FEDERAL TAX ID NUMBER

(NEEDED FOR PAYROLL, CREDIT, BANK ACCOUNT, ETC.)

Apply online at  
<https://sa2.www4.irs.gov/modiein/individual/index.jsp>

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SALES TAX ID NUMBER & PERMIT\*

(TO COLLECT SALES TAX FOR RETAIL & SERVICE SALES)

Check your State to Apply for Sales Tax ID Number & Permit

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STATE WITHHOLDING NUMBER\*

(PAYROLL)

Check your State to Apply for State Withholding Number

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\*Note: Your regularity of filing taxes for payroll and sales tax will be determined by your monthly collections.\*





# Staffing

## EMPLOYEE AND OWNER BENEFITS

Health Insurance

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Life Insurance

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Disability

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Dental

---

Retirement

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Other

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## STAFFING PREPARATIONS & PLANS

Employee Manual

---

Job Descriptions

---

Standard Operating Procedures

---

Recruiting plans and practices

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Orientation, Training and Ongoing Education

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Agreements and other contracts

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Compensation Plan (salary vs. commission vs. fee per service vs. hybrid for services) + Retail compensation and tipping

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Uniforms

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# Business Insurance

Workers' Compensation

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Professional liability

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General Business Liability with Sexual Assault/Molestation Rider

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Medical spa insurance

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Special needs (flood, business interruption, etc.)

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Copies of individual policies for each service provider if not covered by your policy (ICs, renters)

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# Financial/Record Keeping

## INITIAL FINANCING

Line of Credit

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Credit Cards

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## EQUIPMENT

Equipment Leases

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## INITIAL FINANCING

Primary checking

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Interest bearing savings for gift certificate purchases or reserves/tax deposits

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# SET-UP PAYROLL & ACCOUNTING (DO THIS THROUGH ACCOUNTANT OR PAYROLL SERVICE)

Payroll tax deposits filed electronically

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Payroll

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Direct deposit

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Tax returns filed electronically

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Electronic signature for checks

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Retirement and insurance drafts

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SELECT POINT OF SALE SYSTEM  
(INTEGRATES WITH YOUR ACCOUNTING PROGRAM)

Online Appointment Booking

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Online Appointments

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Client Management & Marketing

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Time clock/ Payroll

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Cash register

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Inventory Management

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Integrated credit card processing

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Web-based or web accessible

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## FURTHER FINANCIAL SET UP

Credit card processing (if not in POS)

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Swiped & Online Gift Certificates

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Shopping cart/online processor

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Bookkeeping program or bookkeeper (ask your accountant)

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## NOTES

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# Marketing

## ADVERTISING/MARKETING BUDGET, PLAN AND CALENDARS

Monthly

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Annual

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## LOGO DESIGN & IMAGE CREATION/SELECTION

Logo & Branding

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## WEB SITE/EMAIL

Autoresponders for marketing

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Online newsletter sign-up

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Specials and last minute appointment updates

---

Free resources, classes, videos, audio, etc.

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Blog

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Social Media links

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Online Booking

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Online gift certificates

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Client testimonials and reviews

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## SOCIAL MEDIA

Facebook Page

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YouTube

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Instagram

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TikTok

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Twitter (X)

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Yelp and other online profiles (reviews)

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Social media posting schedule

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## SPA LOCATOR/REFERRAL SERVICES

Spa Finder

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Spa Week

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Web Openings

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## PRINTING

Spa menu (Service descriptions and separate price list)

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Business cards/appointment cards

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Include special offer for new clients or introductory service & print blanks for new hires

Referral cards

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Client forms, waivers

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Stationary, thank you cards/birthday cards/envelopes, "We miss you" cards

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Gift certificates

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## CONTIINUE MARKETING

Bags/pens/other packaging

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Other promotional pieces

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Referral program

---

Birthday/ Anniversary Program

---

Loyalty Program

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VIP Program/Memberships

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Community/Charity involvement and/or donations

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Banners/signage

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Uniforms/name tags

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Networking groups (BNI, leads groups, etc.)

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## FUSION MARKETING/ALLIANCE MARKETING

Neighboring businesses

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Similar/complementary businesses

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Businesses with the same target market

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## BUSINESS AND TRADE ASSOCIATIONS

Local Chamber of Commerce/Merchants Associations

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Spa Industry Association

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ISPA

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## NOTES

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# ADVERTISING PLAN

Start-up campaign

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Ongoing image advertising

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Targeted niche advertising

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# UTILITIES/SERVICES

Gas

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Water

---

Electric

---

Phone/Fax

---

Internet

---

Cable

---

Cell phones

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Linen service/laundry

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Cleaning Service

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Bottled water or coffee service

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Meals/Catering (for spa days, special events)

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Vending (for staff)

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## NOTES

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# PRODUCTS AND SUPPLIES

Retail

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Backbar/Professional

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Operating supplies

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# EQUIPMENT

Skin care

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Massage

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Spa

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Nails

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Fitness/Yoga

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Other services (teeth whitening, foot detox, sauna, tanning)

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Office

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Computer

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Break Room

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## OTHER NEEDS

Magazines

---

Plants/décor/art

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Refreshments

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Special touches

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## SECURITY

Safe

---

Cameras

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Alarm System

---







# POSSIBLE PROFESSIONAL ADVISORS

Attorney

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Accountant

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Architect

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Banker

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Insurance agent

---

Business coach or consultant

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Interior designer

---

General contractor

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*Felicia Brown*  
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Want one-on-one help to start, grow, or  
expand your business?

Visit [www.FeliciaBrown.com](http://www.FeliciaBrown.com) to schedule  
an initial consultation and get started on  
your success!

[www.FeliciaBrown.com](http://www.FeliciaBrown.com)

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**Get your free trial of ClinicSense PLUS 50% off for your first two months by visiting:**  
**[www.Get.ClinicSense.com/felicia-brown](http://www.Get.ClinicSense.com/felicia-brown)**

## Why I Recommend ClinicSense Massage Therapy Software

I have worked in the wellness space for nearly 30 years as an award-winning massage therapist, spa owner, and coach.

I know the common challenges people face when building a massage business, and I am passionate about helping them succeed. That is why I wanted to bring this tool to my clients.

After I met with the ClinicSense team and learned about their solution, I was eager to partner with them because I believe this software can help my clients win.

For me, the ClinicSense solution checks all the boxes. It's economical, saves my client's time, and helps them make more money with less stress.

Their solution provides massage therapists with all the tools they need to run their business operations, manage their clients and files, and grow their business with marketing tools.

**Visit [www.Get.ClinicSense.com/felicia-brown](http://www.Get.ClinicSense.com/felicia-brown) to learn more and start your free trial!**