





MASSAGE, SPA, & WELLNESS BUSINESS Start Up Checklist

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Determine Concept & General Design or Theme

KNOWING YOUR WHY Your Story Your Passion Your Vision Your Philosophy



DEFINING YOUR WHAT

Services

Products Selection

UNDERSTANDING YOUR WHO

Target Market & Pricing

Dream Team Definition



CREATING THE WHERE

Name,	logo	З	Images
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Service Mark for Business Name & Logo

Trademark	(for Products)
Iraaemark	Tor Products

U.S. Trademark Office: <u>www.uspto.gov</u>

What's the difference between service marks, trademarks, and patents? <u>www.uspto.gov/web/offices/pac/doc/general/whatis.htm</u>

Secure Domain name(s) for Website

Secure domain name(s): <u>www.godaddy.com</u>

Hire graphic designer for logo, website, other marketing materials



Location & Atmosphere
Overall Décor, Colors, & Theme
DETERMINING THE HOW
Set Initial Goals & Timeline
Talk with Similar Professionals, Mentors, or Coaches



BUSINESS NAME

Establish Business Name

Check with the Secretary of State and DBA in your county for available names

NOTES



Create Business Plan, Financials, & Budget

INITAL FINANCIAL PLAN
Financial Goals
Expectations
Start-Up Costs
Income Projections



Operating Budget		



Monthly Budget Sheet Example

	INCOME						
DATE	SOURCE	CATEGORY	AMOUNT				

BILLS & FIXED EXPENSES			VARIABLE EXPENSES			
DATE	SOURCE	AMOUNT	DATE	SOURCE	AMOUNT	

SUMMARY	
SOURCE	AMOUNT
INCOME	
BILLS & FIXED EXPENSES	
VARIABLE EXPENSES	
BALANCE	

CONTINUING FINANCIAL PLANNING

Contact Financial Advisor or Accountant to Write Financials
Hire consultant to oversee start-up process
Contact Banker or Funding Partners for Investment or Loan
Gather Personal Financial Information, Tax Returns, Etc.
NOTES



Set Up Business Structure

SET-UP BUSINESS STRUCTURE (LLC, S-CORP, LLP, PARTNERSHIP, OR SOLE PROPRIETOR)

Talk to your Accountant & Attorney for Help in This Area

NOTES



Find Location

CONSIDER THESE FACTORS WHEN FINDING YOUR LOCATION
Access, Visibility, & Traffic Flow
Parking
Safety
Close or convenient proximity to target market(s)
Signage
Neighbors & Local Resources/services



ISSUES TO DISCUSS FOR LEASING

Initial	Lease	Rate	Lease	Term
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Option to purchase the property (first right of refusal)

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

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.)

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



What additional fees apply? (repairs, CAM, taxes, maintenance)
Who is responsible for interior repairs? Exterior repairs? Lawn maintenance? Painting the exterior? Maintaining the roof?
What are the limitations for signage or building changes?
Will the landlord contribute to up-fit/improvements you make?
How is the rent to be paid – where/when?
What are the deposits required?
Pre-move in inspections and repairs/cleaning
Lease assignability





Who has control of heat/air?

Past tenants of space – why did they leave?

NOTES



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

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

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



The equipment and machinery that you will keep and us rented space.	e in the
Your business hours and any plans to change it in the future.	ne near
Your contact details and the best possible place for meetings.	further



Negotiate Lease or Purchase

Attorney	/ Review	lease
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Have A/C , roof, electrical, plumbing inspected

1	Determine	potential	repairs	and	up-fits	(carpet,	paint,
	fixtures) be	fore taking	j occupa	ncy			

Property insurance requirements

Payment details, location, method and date

Sign lease or contract

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





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

GENERAL CONTRACTOR

Painter

Plumber

Electrician

HVAC (Heating & Air)

General Construction (Dry wall/other buildings and repairs)



BUILDING PERMITS AND INSPECTIONS (THROUGH CITY OR COUNTY)

Your contractor is usually responsible for this. Have him or her check to see if there is an expedited application process which can save you a few weeks or more at the start of your project

NOTES



APPLY FOR REQUIRED LICENSES, PERMITS, ETC.

FEDERAL TAX ID NUMBER

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



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

SALES TAX ID NUMBER & PERMIT* (TO COLLECT SALES TAX FOR RETAIL & SERVICE SALES)

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

STATE WITHHOLDING NUMBER* (PAYROLL)

Check your State to Apply for State Withholding Number

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



OTHER LICENSES & PERMITS

Apply for salon license (nails, hair, facials, body wraps)

Apply for massage establishment license (check your state)

NOTES



Staffing

EMPLOYEE AND OWNER BENEFITS

Health Insurance
Life Insurance
Disability
Dental
Retirement
Other



STAFFING PREPARATIONS & PLANS

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Job Descriptions

Standard Operating Procedures

Recruiting plans and practices

Orientation, Training and Ongoing Education



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





Business Insurance

Workers' Compensation
Professional liability
General Business Liability with Sexual Assault/Molestation Rider
Medical spa insurance
Special needs (flood, business interruption, etc.)
Copies of individual policies for each service provider if not covered by your policy (ICs, renters)





Financial/Record Keeping

INITIAL FINANCING
Line of Credit
Credit Cards
EQUIPMENT
Equipment Leases
INITIAL FINANCING
Primary checking

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



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

Payroll tax deposits filed electronically
Payroll
Direct deposit
Tax returns filed electronically
Electronic signature for checks
Retirement and insurance drafts



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

Online Appointment Booking

Online	Appointments
Onnie	Appointments

Client Management & Marketing

Time clock/ Payroll

Cash register

Inventory Management

Integrated credit card processing

Web-based or web accessible



FURTHER FINANCIAL SET UP

Credit card processing (if not in POS)	
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Swiped & Online Gift Certificates

Shopping cart/online processor

Bookkeeping program or bookkeeper (ask your accountant)

NOTES



Marketing

ADVERTISING/MARKETING BUDGET, PLAN AND CALENDARS

Monthly
Annual
LOGO DESIGN & IMAGE CREATION/SELECTION
Logo & Branding
WEB SITE/EMAIL
Autoresponders for marketing
Online newsletter sign-up



Specials and last minute appointment updates
Free resources, classes, videos, audio, etc.
Blog
Social Media links
Online Booking
Online gift certificates
Client testimonials and reviews



SOCIAL MEDIA
Facebook Page
YouTube
Instagram
TikTok
Twitter (X)
Yelp and other online profiles (reviews)
Social media posting schedule



SPA LOCATOR/REFERRAL SERVICES

Spa Finder
Spa Week
Web Openings
PRINTING
Spa menu (Service descriptions and separate price list)
Business cards/appointment cards
Include special offer for new clients or introductory service & print

blanks for new hires



Client forms, waivers

Stationary, thank you cards/birthday cards/envelopes, "We miss you" cards
Gift certificates
CONTIINUE MARKETING
Bags/pens/other packaging
Other promotional pieces
Referral program
Birthday/Anniversary Program
Loyalty Program



VIP Program/Memberships
Community/Charity involvement and/or donations
Banners/signage
Uniforms/name tags
Networking groups (BNI, leads groups, etc.)
FUSION MARKETING/ALLIANCE MARKETING
Neighboring businesses
Similar/complementary businesses





Businesses with the same target market

BUSINESS AND TRADE ASSOCIATIONS

Local Chamber of Commerce/Merchants Associations

Spa Industry Association

ISPA

NOTES



ADVERTISING PLAN

Start-up campaign
Ongoing image advertising
Targeted niche advertising





UTILITIES/SERVICES

Gas
Water
Electric
Phone/Fax
Internet
Caple
Cell phones
Linen service/laundry

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Cleaning Service
Bottled water or coffee service
Meals/Catering (for spa days, special events)
Vending (for staff)
NOTES



PRODUCTS AND SUPPLIES

Retail
Backbar/Professional
Operating supplies



Office supplies		
NOTES		



EQUIPMENT

Skin care		
Massage		
Spa Spa		



Fitness/Yoga	
] Fitness/Yoga	
] Fitness/Yoga	
Fitness/Yoga	
Other services (teeth whitening, foot detox	, sauna, tanning)



Office		
Computer		
Break Room		



Laundry/Storage		
NOTES		



OTHER NEEDS

Magazines
Plants/décor/art
Refreshments
Special touches
SECURITY
Safe
Cameras
Alarm System





POSSIBLE PROFESSIONAL ADVISORS

Attorney
Accountant
Architect
Banker
Insurance agent
Business coach or consultant
Interior designer
General contractor
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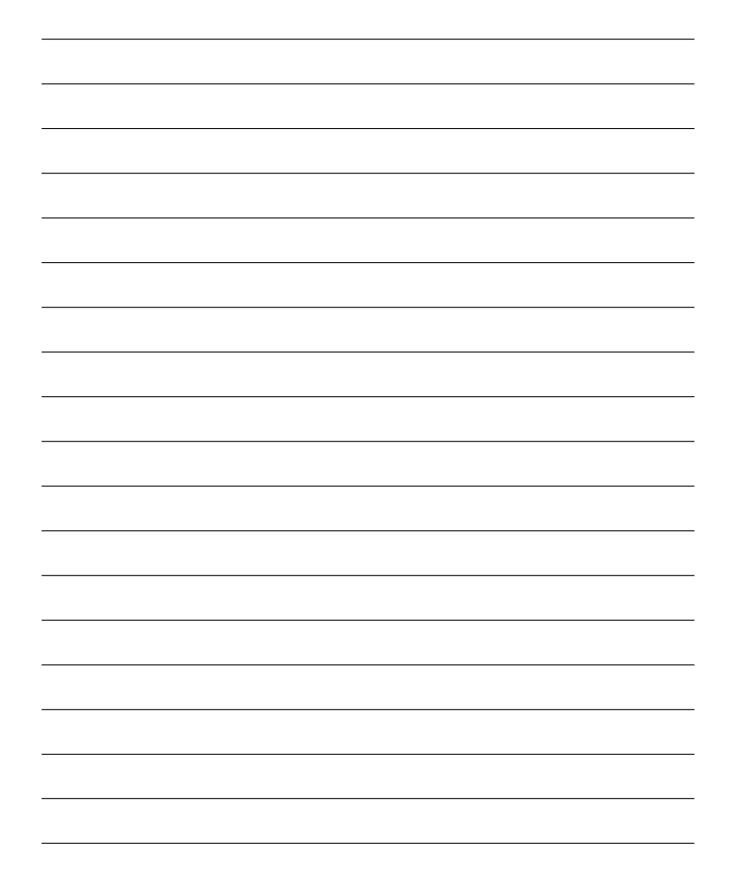
Felicia Brown

IT consultant	
Web Designer	
Social Media Specialist	
NOTES	

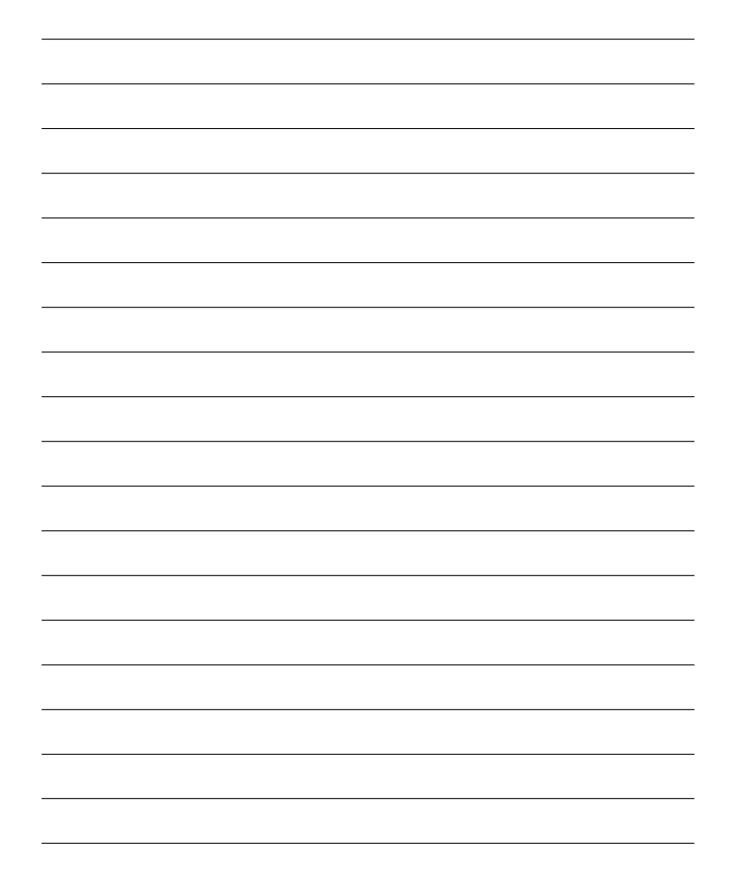


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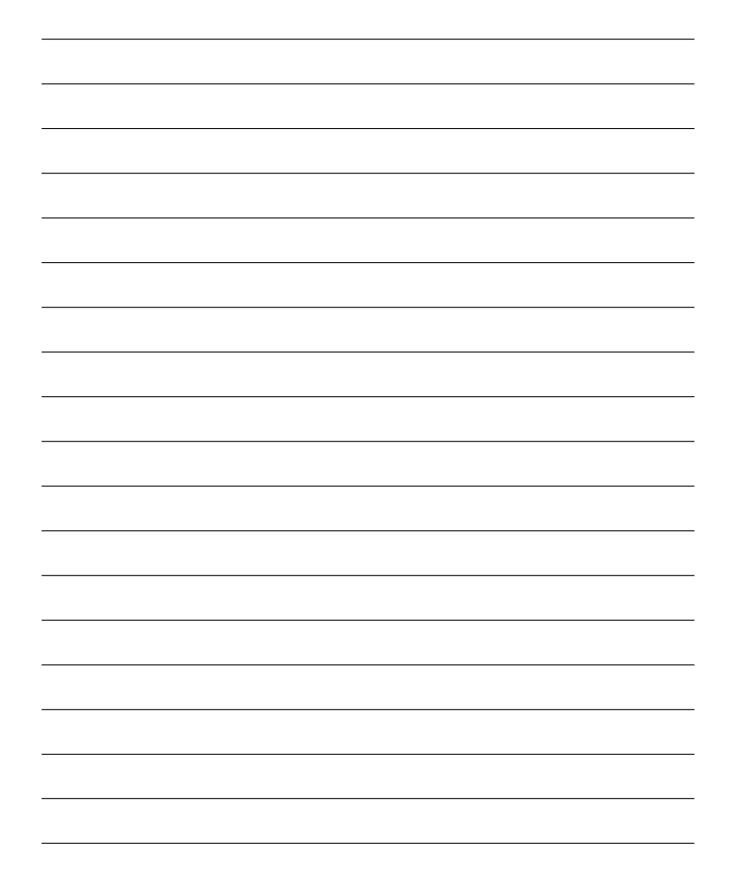
















Want one-on-one help to start, grow, or expand your business?

Visit www.FeliciaBrown.com to schedule an initial consultation and get started on your success!

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

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 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 to learn more and start your free trial!