



Modern Day PA

Small Business Admin Organiser

*The Ultimate
Checklist for Setting
Up a New Business*

| Virtual Assistant |
| Admin Organiser |

My Story



My Story –

Hi, I'm Cath McGregor, virtual assistant. I have a background of 20+ years in admin roles, with the last 10 years as executive assistant to executives in the mining industry.

I felt I'd done as much as I could and wanted a role more personalised than the corporate culture could offer. I wanted to help small business owners who wouldn't normally have access to an assistant.

So, I started my own business as a Virtual Assistant helping small business owners/sole traders/consultants with flexible admin support.

My Vision –

To free-up time for consultants, so they are less stressed, more organised and have more time.

What I Do –

I help consultants get things done, so they feel more organised and look more professional.

I provide flexible virtual assistance including general PA tasks, document formatting, LinkedIn updates, marketing admin support and more.

Based in Cleveland, Brisbane, I work remotely for clients from Brisbane to Darwin to Perth.

Who I Help –

My niche market is mining consultants, but I also love working with other specialists, from business coaches to spiritual workers.

My Specialties –

Preparing professionally presented documents, capability statements, professional presentations, LinkedIn profile updates, e-newsletters, task organisation in Trello, bringing your website content up-to-date and helping you look professional.

The Ultimate Checklist for Setting Up a New Business

	TASK	SUPPORTING INFORMATION
	REGISTRATIONS	
<input type="checkbox"/>	Develop a business plan	Start with 20 Minute Business Plan: Business Model Canvas Then develop a complete biz plan with the template at Business.gov.au
<input type="checkbox"/>	Decide on a business name	Read this helpful article: Choose a brilliant business name
<input type="checkbox"/>	Setup business email account	Outlook.com
<input type="checkbox"/>	See an Accountant and choose type of business entity, discuss tax and GST requirements, bookkeeping software, ASIC registrations	Business entity type: Sole trader, partnership, company
<input type="checkbox"/>	Establish a salary amount for owner/self	ATO Tax Calculator
<input type="checkbox"/>	Register with ASIC for a business name and ABN	Aust Govt Business Registration Service
<input type="checkbox"/>	If company, register company name with ASIC for ACN, TFN	Aust Govt Business Registration Service
<input type="checkbox"/>	If company, file letters of incorporation	See your Accountant
<input type="checkbox"/>	If paying wages/employees, register for PAYG	ATO
<input type="checkbox"/>	If revenue planned to exceed \$75,000, register for GST	ATO
<input type="checkbox"/>	Open a business banking account	See your credit union or banking institution Documents to provide: constitution, Business Registration Letter, Company Registration Letter, TFN, ABN, ACN
<input type="checkbox"/>	Apply for membership to professional industry organisations	Relevant to your industry/profession
<input type="checkbox"/>	Purchase insurance – public liability, equipment cover, professional indemnity, income protection	Contact your Insurer
	BUSINESS FUNDAMENTALS	
<input type="checkbox"/>	Make a list of the services you would like to provide	Refer to past position descriptions and select the tasks that you enjoyed doing. Read this article: Define your Product or Service
<input type="checkbox"/>	Work out your niche	Discover your niche
<input type="checkbox"/>	Use a rates calculator to determine rates and develop your budget	Research and compare with other local competitors Refer to this guide: Hourly Rate Calculator

TASK		SUPPORTING INFORMATION
<input type="checkbox"/>	Attend marketing coaching or mentoring	Recommended coach in the Redlands: Business Growth & Development Centre Look up local council free workshops on marketing, or search Eventbrite free marketing workshops in your local area.
<input type="checkbox"/>	Prepare your marketing and brand fundamentals	Read this article: Brand Building Process Target market Unique Selling Proposition (USP) Elevator pitch Hot buttons Call to action Compelling marketing message
<input type="checkbox"/>	Setup your branding style guide	Read this article: Visual Style Guide
<input type="checkbox"/>	Design a logo, business cards, letterhead, brochure	DIY – download free software via Microsoft Store – Logo Maker – Logo Creator, Generator & Designer Or outsource to a VA: Modern Day PA
<input type="checkbox"/>	Set your advertising campaigns	From the Business Model Canvas that you created earlier, you will now set out your advertising campaigns to promote your biz.
<input type="checkbox"/>	Purchase office equipment	Laptop Monitor External hard drive Keyboard, mouse, laptop stand, USB hub Chair Desk Power board Printer Modem Basic stationery, toners, A4 paper
<input type="checkbox"/>	Setup office space	
SYSTEMS		
<input type="checkbox"/>	Install and set up accounting software	See your Accountant for a 20% “partner” discount on Xero.com Or use Waveapps (free open source) Setup Quote terms Setup Invoice terms
<input type="checkbox"/>	Apply for website domain name registration and web hosting annual subscription	ACS Web Hosting
<input type="checkbox"/>	Create company website	DIY with Wordpress.org or Engage a web builder 1Page.com.au
<input type="checkbox"/>	Arrange professional photographs for use on promotional materials and website	Book a headshot session with a local photographer
<input type="checkbox"/>	Ask former business colleagues to review your website and provide feedback for improvements	Phone, email, or LinkedIn message
<input type="checkbox"/>	Install or sign up for specialist software and cloud-based	DocuSign

TASK	TASK	SUPPORTING INFORMATION
	software applications:	Microsoft Office/Office 365 Microsoft Outlook Dropbox cloud storage Trello task management MailChimp mailing list Skype or Zoom video meetings Canva Toggl time tracker Firefox, Chrome LastPass passwords manager
<input type="checkbox"/>	Setup electronic filing folder structure and save relevant files	Windows explorer local drive/cloud Name <ul style="list-style-type: none"> Business Plan Client Work Financials Marketing Procedures Software Templates
<input type="checkbox"/>	Setup online social business pages	DIY: Facebook , Linked In Outsource to a VA: Modern Day PA
<input type="checkbox"/>	Setup Anti-Virus software	Norton Security
PROCESSES		
<input type="checkbox"/>	Setup reminders to do weekly backups to an external hard drive of your computer C/D drive, email account, bookmarks	Remember to copy folder structure, Documents, Pictures, Outlook.pst.ost file, favorites/bookmarks from internet browser
<input type="checkbox"/>	Compile list of blog articles	Make a list of 40 – 50 key words/phrases of relevant topics (pain points for your clients)
<input type="checkbox"/>	Write blog articles & post online regularly	Use my Blog Post Checklist and Blog Post Template . Post onto website blog, then share to Linked In, Facebook Groups and Facebook Page, and share links to Facebook groups. Or Outsource to a VA: Modern Day PA
<input type="checkbox"/>	Join a local face-to-face networking group	Attend local networking meetups – look for a good match to your target market Five Foot Rope Networking Events
<input type="checkbox"/>	Join an online networking group	Join Facebook networking groups Five Foot Rope Business Connective Flying Solo micro business community
<input type="checkbox"/>	Setup email templates/scripts	Follow up after networking email script Response to prospect after initial call email script Welcome email script Kick-off call email script Referral Request email script Testimonial Request email script

	TASK	SUPPORTING INFORMATION
<input type="checkbox"/>	Setup branded marketing templates	Capability Statement Flyers for specific events, specials Client Presentation Report Facebook cover image Linkedin cover image Facebook post images Outsource to a VA: Modern Day PA
<input type="checkbox"/>	Setup a Portfolio of past work samples (or create samples of what you can do)	Add screenshots to a PowerPoint presentation, then upload to your website. Outsource to a VA: Modern Day PA
<input type="checkbox"/>	Setup a Client Intake System	Client enquiry questionnaire Client contact details form Services list by levels/packages Pricing list by levels/packages Client Intake checklist Outsource to a VA: Modern Day PA
<input type="checkbox"/>	Setup a potential clients list	Review contacts in your phone, email, business cards, Facebook, and Linkedin. Add to a spreadsheet.. Outsource to a VA: Modern Day PA
<input type="checkbox"/>	Contact everyone in your network and let them know about your new business	Approach contacts via phone, email or social media to advise of your new business venture.
<input type="checkbox"/>	Setup a Client Services Agreement	Download from https://lawlive.com.au/ Or see your solicitor.
<input type="checkbox"/>	Setup a vehicle travel log	If using personal vehicle for work purposes: ATO car expenses
<input type="checkbox"/>	Setup a business self-management routine and add reminders into calendar	<ul style="list-style-type: none"> - Admin time eg bookkeeping, backups, following up prospects - Networking events attendance - Marketing including blog posts, social media posts, commenting in online forums, Facebook groups, Linkedin posts, website updates



CATH MCGREGOR

Modern Day PA Testimonials

I have worked with Cath on a couple of occasions now and it really is amazing the time that she has saved me. Cath taught me how to use Mail Chimp and that alone not only saved me time but enabled me to utilise my growing database correctly.

I was so impressed with the services that Cath provided and the difference it made to my everyday that I asked her to be a guest speaker at my networking group. Cath shared some fantastic time saving tips with our group and the feedback was amazing.

I can't recommend Cath McGregor highly enough. It is always an absolute pleasure working with her.

**Suzi Manley, Five Foot Rope Business
Connective, Client, Oct 2018**

An ENORMOUS THANK YOU to Cath McGregor of Modern Day PA. I had a printing emergency, outside office hours and Cath saved my day. The most responsive PA I have ever met. Cath - you are a super star.

**Cathy Young, Accelerate Business Consultancy,
Client, Nov 2018**

I am so very impressed with the changes to my website. I look professional!

Leighann, Psychic Leighann, Client, Nov 2018

We just looked at the Slide. It's perfect we both love it!! Especially the photo!! Great job!! Thank you.

**Shemaine, Shemaine Medium,
Client, Dec 2018**

Absolutely amazing thank you so much you have taken the hard work out of running my business. You are a lifesaver. I'm organised and ready for the new year. Thank you so much.

**Ambre, Aurora Crystal Gifts &
Services, Client, Jan 2019**

Cath has helped me out on a number documents and I have found her service to be professional, timely and creative. Cath is competent in her work and I would recommend her services.

**Robyn Brickell, Planning Manager,
Client, May 2018**

Need to outsource your biz setup tasks?

Engage a virtual assistant to help you get it done.

Find out more – visit website



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