

# From Idea to Action: The Startup Launch Checklist

This checklist is a practical guide to help you take the first steps in building your startup. It is designed to help you navigate the first steps. It's not exhaustive and doesn't replace expert advice, but it will highlight what to watch out for. Use it as a guide, not a rulebook.

## IDEA VALIDATION

- ☐ **Validate product-market fit**  
Is the product/service addressing a need or problem? How big is the potential market for it?

## PRODUCT/ SERVICE DEVELOPMENT

- ☐ **Build MVP (minimum viable product)**
- ☐ **Undertake user testing**  
Gather feedback from testing to refine
- ☐ **Identify features for initial launch**  
Prioritise core features and functionality
- ☐ **Define product roadmap**  
Plan development sprints, timeline, and required resources with clear milestones

## BUSINESS STRATEGY & PLANNING

- ☐ **Define business model**  
Value proposition, pricing, target customers, channels, revenue streams, cost structure
- ☐ **Shortlist brand and company names**  
Early consideration to avoid future changes
- ☐ **Develop GTM (go-to-market) plan**  
How to sell: target customers/segments, value prop, research & competitive analysis, pricing strategy, distribution channels, sales strategy, marketing tactics & success metrics
- ☐ **Build financial plan**  
Revenue projections with clear assumptions, COGS, operating costs, risk scenarios, capitalization table
- ☐ **Create business plan**  
Company description, offering, GTM, operations, financials, objectives & milestones
- ☐ **Consider Exit Planning**  
Longer-term exit scenarios: acquisition, merger, IPO, or sustainable long-term ownership. What do founders want?

## LEGAL

- ☐ **Choose structure and when to incorporate**  
Most common legal forms for startups are limited liability company (GmbH) and stock corporation (AG). If you plan to raise venture capital, you will need an AG. Confirm minimum share capital requirements (CHF 20k GmbH / CHF 100k AG)
- ☐ **Choose company name**  
Check naming rules relating to legal structure; consider preferred brand name(s) & domain name and ability to register those
- ☐ **Draft Articles of Association**  
Define Articles of Association (purpose, share capital, shareholder rights, governance, management structure)
- ☐ **Execute Founders' or Shareholders' Agreement**  
Define founder roles, equity split, vesting schedules and dispute resolution
- ☐ **Open a bank account**  
Initially require a Capital Deposit Account (Kapitaleinzahlungskonto) which remains blocked during formation; then transferred to a company bank account after incorporation
- ☐ **Appoint directors & managers**
- ☐ **Set up and maintain Share Register and Beneficial Owners Register**
- ☐ **Register company with Commercial Register**  
Submit application with draft Articles of Association and registered address; obtain company identification number (UID)
- ☐ **Define governance structure**  
Board composition, board regulations / advisory structures, reporting / compliance practices, and potential advisory board setup
- ☐ **Identify and protect intellectual property**  
Trademarks, patents, copyrights, designs, – also domains, social media accounts, vanity URLs. Ensure you fully own IP and have NDAs if necessary

## FUNDING

- ☐ **Determine funding required to reach next milestones**
- ☐ **Research funding type(s)**  
Bootstrapping, angel investors, venture capital, crowdfunding, grants
- ☐ **If Business Angels/VCs: Research investors carefully**  
Check investment stage, ticket size, geography, and industry focus to ensure you fit their target
- ☐ **Prepare financial forecast**  
12–18mth projections of cash flow, runway & realistic initial budget (setup costs, hiring, equipment, marketing, operations). Ensure aligns with funding ask!
- ☐ **Prepare pitch deck**  
Covering market opportunity, business model, KPIs, team, funding use. Develop a compelling one-pager/ executive summary for initial outreach

## ADMIN & OPERATIONS

- ☐ **Choose and set up core tools or providers for:**  
Accounting, payroll, time tracking, inventory, CRM, orders, invoicing, payments, project management
- ☐ **Obtain required permits/licences and approvals**  
Business dependent and/or industry specific, so do your research
- ☐ **Confirm VAT liability; register if required**
- ☐ **Obtain necessary insurance coverage**  
Potentially general liability, professional indemnity, cyber, credit, property, employee-related
- ☐ **Register domain name(s) & secure social media accounts/handles**
- ☐ **Build a professional, SEO-optimized website with analytics and set up social media accounts**
- ☐ **Create a risk management framework**
- ☐ **Develop sustainability strategy**  
Identify relevant ESG principles and define metrics
- ☐ **Keep accurate and up-to-date financial records**
- ☐ **Establish 'dataroom'**  
Store all agreements & records (facilitates due diligence during fundraising)
- ☐ **Implement regular compliance audits**  
Financials, internal controls, fraud prevention

## IT & CYBERSECURITY

- ☐ **Setup IT infrastructure**  
Hardware, networking, internet, cloud or on-premise, software licences, support/maintenance agreements
- ☐ **Implement data & system security**  
Backups, disaster recovery plan, password management, access controls & authentication (2-factor), secure communications (VPN, encryption), anti-virus, firewall, updates & patch management, train employees
- ☐ **Ensure compliance**  
Data protection (GDPR/FADP), data storage (in CH per FINMA, healthcare data laws, employee data laws), NIST & ISO security frameworks including risk assessment, train employees

## STARTUP DESKS

Explore the first topics from this checklist and meet the partners supporting these areas on our startup desks:

→ [Accelerator & Incubator](#)  
→ [Fundraising](#)  
→ [Legal](#)  
→ [Insurance](#)  
→ [IT & AI](#)



## TEAM & HR

- ☐ **Define roles & responsibilities**  
**Identify resources to hire and what to outsource**  
To agencies, freelancers, or fractional CxOs
- ☐ **Create an employee incentive plan (e.g. ESOP/VSOP), if applicable**
- ☐ **Align on decision-making, equity splits and collaboration principles early**  
Document key agreements between co-founders.  
Can be in Founders' or Shareholders' Agreement
- ☐ **Use employment agreements**  
including non-compete and non-solicitation (incl. liquidated damages), right to inventions & designs, provisions on overtime and hours
- ☐ **Register employees in social insurance (Ausgleichskasse) choose pension fund (BVG) and employee insurances**
- ☐ **Ensure compliance with labour laws**  
Relating to wages, working hours, health & safety regulations
- ☐ **Implement HR management system**  
For payroll, benefits, tax filings, performance tracking, contracts
- ☐ **Define and communicate company values to shape culture**  
With clear goals & expectations, fostering collaboration & inclusion
- ☐ **Develop an employee manual**  
Policies on standards of conduct, confidentiality, conflicts of interest, working hours, travel expenses, etc
- ☐ **Establish a structured onboarding process**  
Orientation, training, equipment, buddy/mentor approach

## GTM: MARKETING

- ☐ **Analyse the market**  
Industry trends, market gaps, competitors' strengths, weaknesses & value props
- ☐ **Understand your target audience**  
Research and define buyer personas, pain points, demographics/firmographics, behaviours
- ☐ **Articulate value proposition/messaging**  
Clearly communicating problem solving, how differentiated, value delivered and reason to believe in compelling message(s)
- ☐ **Define brand strategy and identity**  
What are the brand values and positioning? Identity: logo, color palette, visual style, and tone of voice. (Note: most startups refine and evolve their branding over time)
- ☐ **Develop communications plan**  
Create a simple communications plan that outlines what you'll say, to whom, and through which channels to keep your messaging consistent and focused
- ☐ **Define marketing goals**  
Clear, specific, measurable and aligned with business objectives
- ☐ **Decide on marketing strategies**  
Targets, channels, positioning, messages
- ☐ **Choose your marketing channels**  
Social media, content, email, paid ads, etc
- ☐ **Plan specific tactics and timing**  
Campaigns, content calendar, launches
- ☐ **Allocate budget and resources**
- ☐ **Define KPIs to track performance**  
Measure vs. targets on reach, response, conversion, continuously measure and optimize

## STARTUP DESKS



Check out these focus areas from the checklist and meet the partners who can support you:

→ [HR](#)  
→ [Marketing & Sales](#)

Explore more insights, resources, and connections!



## GTM: SALES & DISTRIBUTION

- ☐ **Define your sales model**  
Direct, in-house sales team, channel partners, resellers
- ☐ **Define pricing**  
Define your pricing model by balancing costs, customer value, and competitor benchmarks to ensure it's sustainable and attractive
- ☐ **Build sales process**  
Strategy how to move prospects from lead generation and qualification through nurturing to conversion, while tracking performance and pipeline health; confirm sales incentives
- ☐ **Develop sales tools**  
Scripts, presentations, case studies, demos and integrate into CRM system
- ☐ **Define service levels**  
Delivery speed, returns handling, customer support, response times etc
- ☐ **Decide on distribution model**  
Set up warehousing, inventory management, and shipping/fulfilment to ensure products are available and delivered on time
- ☐ **Choose distributors, channel partners, logistics & fulfilment suppliers**  
Build relationships with partners suitable for your scale, growth plans and customer needs

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**DOWNLOAD** the digital Checklist here!