

Cleaning Business Startup Checklist

Practical cleaning business template • Customize fields before use

Brand customization: *This TidyOps-branded example shows a finished presentation. Replace the logo, colors, company details, and placeholders with your own brand before use.*

Start and organize your cleaning business step by step

Business Name:

Owner(s):

Target Launch Date:

Primary Service Area:

Business Type:

- ☐ Residential Cleaning
 - ☐ Commercial Cleaning
 - ☐ Vacation Rental Cleaning
 - ☐ Janitorial
 - ☐ Move-In / Move-Out Cleaning
 - ☐ Post-Construction Cleaning
 - ☐ Specialty Cleaning
 - ☐ Other:
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1. DEFINE YOUR BUSINESS

Before buying equipment or advertising, decide what kind of cleaning company you are building.

- ☐ Choose your target customer
- ☐ Decide which cleaning services you will offer
- ☐ Define your initial service area
- ☐ Decide whether you will serve residential customers, commercial clients, or both
- ☐ Decide whether you will start alone or hire cleaners
- ☐ Identify your main competitive advantage
- ☐ Research competing cleaning companies in your market
- ☐ Review competitor services
- ☐ Review competitor pricing where available
- ☐ Identify gaps you can serve

2. CHOOSE A BUSINESS NAME

- ☐ Brainstorm business names
- ☐ Search for similar local businesses
- ☐ Check applicable business-name availability
- ☐ Check domain-name availability
- ☐ Check social-media availability
- ☐ Consider trademark conflicts
- ☐ Choose final business name

Business Name:

Domain:

3. CREATE YOUR BUSINESS ENTITY

Determine the appropriate business structure for your situation.

Possible structures may include:

- ☐ Sole Proprietorship
- ☐ LLC
- ☐ Corporation
- ☐ Partnership
- ☐ Other:
- ☐ Research state / provincial / local requirements
- ☐ Register business entity where required
- ☐ Register assumed / trade name where required
- ☐ Obtain formation documents
- ☐ Store business records securely

Entity Type:

Formation Date:

State / Jurisdiction:

Consult qualified legal and tax professionals when selecting a business structure.

4. TAX & BUSINESS IDENTIFICATION

- ☐ Obtain required federal tax identification
- ☐ Obtain required state / local tax accounts
- ☐ Determine whether cleaning services are taxable in your jurisdiction
- ☐ Determine payroll-tax requirements if hiring
- ☐ Determine estimated-tax obligations
- ☐ Establish tax-record procedures

Tax / Registration Notes:

Do not publish tax identification numbers on this checklist if it will be shared or stored insecurely.

5. LICENSES & PERMITS

Research requirements for every jurisdiction where you operate.

- ☐ State requirements reviewed
- ☐ County requirements reviewed
- ☐ City requirements reviewed
- ☐ General business license obtained if required
- ☐ Home-based business requirements reviewed if applicable
- ☐ Specialty-service licensing reviewed
- ☐ Sales / service tax registration reviewed
- ☐ Renewal dates recorded

Required Licenses / Permits

License / Permit	Agency	Renewal Date

6. BUSINESS BANKING

- ☐ Open dedicated business bank account
- ☐ Separate business and personal transactions
- ☐ Obtain business debit / credit card if appropriate

- ☐ Establish expense-tracking process
 - ☐ Establish deposit procedure
 - ☐ Establish owner-draw / payroll procedure with appropriate advice
- Banking Setup Complete: ☐

7. ACCOUNTING & BOOKKEEPING

- ☐ Choose accounting method with appropriate professional advice
- ☐ Select bookkeeping/accounting software
- ☐ Create chart of accounts
- ☐ Establish receipt-storage procedure
- ☐ Track income
- ☐ Track expenses
- ☐ Track equipment purchases
- ☐ Track mileage / vehicle expenses as applicable
- ☐ Establish monthly reconciliation process
- ☐ Select accountant / bookkeeper if needed
- ☐ Create tax-document storage process

Accounting System:

Bookkeeper / Accountant:

8. BUSINESS BUDGET

Estimate your startup expenses.

Startup Expense	Estimated Cost	Actual Cost
Registration / Licensing	\$	\$
Insurance	\$	\$
Cleaning Supplies	\$	\$
Equipment	\$	\$
Uniforms	\$	\$
Website / Domain	\$	\$
Marketing	\$	\$
Software	\$	\$
Vehicle / Transportation	\$	\$
Training	\$	\$
Other	\$	\$

Estimated Startup Cost: \$

Available Startup Capital: \$

9. INSURANCE

Discuss your actual operations with a qualified insurance professional.

Potential coverage may include:

- ☐ General Liability
- ☐ Workers' Compensation
- ☐ Commercial Auto
- ☐ Hired / Non-Owned Auto
- ☐ Business Property / Equipment
- ☐ Umbrella / Excess Liability
- ☐ Janitorial Bond / Fidelity Coverage
- ☐ Cyber / Data Coverage
- ☐ Other:

Insurance Provider:

Renewal Date:

Do not assume a particular policy covers every type of cleaning work you perform.

10. DEFINE YOUR SERVICES

Create a clear service menu.

- ☐ Standard Cleaning
- ☐ Deep Cleaning
- ☐ Move-In Cleaning
- ☐ Move-Out Cleaning
- ☐ Recurring Cleaning
- ☐ Vacation Rental Turnovers
- ☐ Office Cleaning
- ☐ Commercial Janitorial
- ☐ Post-Construction Cleaning
- ☐ Carpet Cleaning
- ☐ Floor Care
- ☐ Interior Windows
- ☐ Other:

For each service, define:

- ☐ Included tasks
- ☐ Excluded tasks

- ☐ Add-ons
 - ☐ Expected labor time
 - ☐ Crew requirements
 - ☐ Products / equipment required
 - ☐ Customer preparation requirements
-

11. BUILD CLEANING CHECKLISTS

Create a standardized checklist for each service.

- ☐ Standard Cleaning Checklist
- ☐ Deep Cleaning Checklist
- ☐ Move-Out Checklist
- ☐ Vacation Rental Checklist
- ☐ Office Cleaning Checklist
- ☐ Janitorial Checklist
- ☐ Post-Construction Checklist
- ☐ Specialty-Service Checklists

Checklists should define what “complete” means so quality does not depend on individual cleaner memory.

12. DETERMINE YOUR COSTS

Before setting prices, calculate the real cost of delivering service.

Include:

- ☐ Cleaner wages
- ☐ Payroll burden
- ☐ Workers' compensation
- ☐ Supplies
- ☐ Equipment
- ☐ Travel
- ☐ Payment-processing costs
- ☐ Insurance
- ☐ Software
- ☐ Administrative labor
- ☐ Marketing
- ☐ Training
- ☐ Recleans / quality costs

☐ Other overhead

Estimated Loaded Labor Cost Per Hour: \$

13. SET YOUR PRICING

Choose a pricing method appropriate for each service.

- ☐ Flat Rate
- ☐ Hourly
- ☐ Square-Foot Pricing
- ☐ Room-Based Pricing
- ☐ Per-Unit Pricing
- ☐ Recurring Contract Pricing
- ☐ Custom Estimate

For every price, know:

Estimated Revenue: \$

Estimated Total Cost: \$

Estimated Profit: \$

Estimated Profit Margin: %

Do not set prices based only on what competitors charge. Your pricing must work with your own costs and productivity.

14. SET A MINIMUM SERVICE CHARGE

A minimum charge can help protect profitability on small jobs.

Minimum Service Charge: \$

Consider:

- ☐ Travel time
 - ☐ Setup time
 - ☐ Minimum labor commitment
 - ☐ Supplies
 - ☐ Payment processing
 - ☐ Administrative cost
-

15. CREATE YOUR ESTIMATE PROCESS

Decide how leads become estimates.

- ☐ Phone estimate

- ☐ Online estimate request
- ☐ Photo-based estimate
- ☐ Residential walkthrough
- ☐ Commercial walkthrough
- ☐ Onsite estimate
- ☐ Other:

Create a consistent process for capturing:

- ☐ Customer details
- ☐ Property details
- ☐ Service requested
- ☐ Condition
- ☐ Frequency
- ☐ Add-ons
- ☐ Access requirements
- ☐ Special surfaces
- ☐ Estimated labor
- ☐ Price

16. CREATE QUOTES & PROPOSALS

- ☐ Create residential quote template
- ☐ Create commercial estimate template
- ☐ Create commercial bid template
- ☐ Define quote expiration period
- ☐ Define approval process
- ☐ Define follow-up process
- ☐ Track accepted / lost estimates

17. CREATE CUSTOMER POLICIES

Create written policies covering relevant issues.

- ☐ Cancellation / Rescheduling
- ☐ Payment
- ☐ Lockout / No Access
- ☐ Damage / Breakage
- ☐ Satisfaction / Reclean
- ☐ Pets

- ☐ Property Access
- ☐ Customer-Supplied Products
- ☐ Photos / Privacy
- ☐ Weather
- ☐ Holidays
- ☐ Other:

Have customer-facing legal terms reviewed where appropriate.

18. CREATE SERVICE AGREEMENTS

- ☐ Residential agreement reviewed
- ☐ Commercial agreement reviewed
- ☐ Recurring-service terms established
- ☐ Payment terms established
- ☐ Cancellation terms established
- ☐ Scope documentation established
- ☐ Signature / acceptance process established

Use qualified legal counsel when creating contracts for actual business use.

19. SET UP PAYMENT COLLECTION

- ☐ Select payment processor
- ☐ Decide accepted payment methods
- ☐ Define when payment is due
- ☐ Create deposit rules
- ☐ Create recurring-payment process if applicable
- ☐ Create failed-payment procedure
- ☐ Create refund procedure
- ☐ Establish secure payment-information practices

Avoid storing payment-card or banking credentials in spreadsheets, notes, texts, or unsecured forms.

20. PURCHASE CLEANING EQUIPMENT

Create your initial equipment list.

- ☐ Vacuum
- ☐ Mop System

- ☐ Buckets
 - ☐ Microfiber Cloths
 - ☐ Dusters
 - ☐ Scrub Brushes
 - ☐ Detail Brushes
 - ☐ Extension Tools
 - ☐ Spray Bottles
 - ☐ Caddy
 - ☐ PPE
 - ☐ Wet-Floor Signs if applicable
 - ☐ Specialty Equipment
 - ☐ Other:
-

21. PURCHASE CLEANING PRODUCTS

- ☐ General cleaner
- ☐ Glass cleaner
- ☐ Bathroom cleaner
- ☐ Degreaser
- ☐ Floor products
- ☐ Disinfectant where appropriate
- ☐ Specialty-surface products
- ☐ Other:

For professional use:

- ☐ Maintain product labels
 - ☐ Maintain Safety Data Sheets
 - ☐ Follow dilution instructions
 - ☐ Establish chemical-storage procedures
 - ☐ Establish PPE requirements
 - ☐ Train employees before use
 - ☐ Never mix incompatible chemicals
-

22. CREATE A SUPPLY SYSTEM

- ☐ Define standard cleaner kit
- ☐ Define standard vehicle inventory
- ☐ Define minimum stock levels

- ☐ Select suppliers
 - ☐ Establish reorder process
 - ☐ Establish bottle-labeling process
 - ☐ Track specialty supplies
 - ☐ Assign inventory responsibility
-

23. CREATE YOUR BRAND

- ☐ Logo
- ☐ Brand colors
- ☐ Business phone number
- ☐ Professional email
- ☐ Domain
- ☐ Website
- ☐ Uniform / dress standard
- ☐ Vehicle presentation
- ☐ Estimate / quote design
- ☐ Invoice design

Keep branding consistent across every customer touchpoint.

24. BUILD YOUR WEBSITE

At minimum, consider pages for:

- ☐ Home
- ☐ Services
- ☐ Service Areas
- ☐ About
- ☐ Contact
- ☐ Request a Quote
- ☐ Frequently Asked Questions
- ☐ Policies
- ☐ Reviews / Testimonials
- ☐ Commercial Services if applicable
- ☐ Individual high-value service pages

Make it easy for visitors to understand what you clean, where you work, and how to request service.

25. SET UP LOCAL SEARCH PRESENCE

- ☐ Create / claim appropriate business listings
- ☐ Verify business information
- ☐ Add service categories
- ☐ Add service area
- ☐ Add business hours
- ☐ Add photos
- ☐ Add website
- ☐ Create review-request process
- ☐ Respond professionally to reviews

Keep business name, contact details, and service information consistent.

26. CREATE YOUR LEAD SYSTEM

Decide where leads can come from.

- ☐ Website
- ☐ Phone
- ☐ Email
- ☐ Local Search
- ☐ Referrals
- ☐ Social Media
- ☐ Paid Advertising
- ☐ Property Managers
- ☐ Realtors
- ☐ Builders
- ☐ Commercial Prospecting
- ☐ Other:

Every lead should have:

- ☐ Source
 - ☐ Contact information
 - ☐ Requested service
 - ☐ Status
 - ☐ Next action
 - ☐ Follow-up date
-

27. CREATE A SALES FOLLOW-UP PROCESS

Define lead stages.

Example:

New Lead → Contacted → Estimate Scheduled → Estimate Sent → Follow-Up → Won / Lost

- ☐ Define lead stages
 - ☐ Set response-time goal
 - ☐ Create quote follow-up schedule
 - ☐ Track lost reasons
 - ☐ Track conversion rate
 - ☐ Track lead source
-

28. SET UP SCHEDULING

- ☐ Choose scheduling system
 - ☐ Define business hours
 - ☐ Define service durations
 - ☐ Define arrival windows
 - ☐ Define recurring schedules
 - ☐ Define travel buffers
 - ☐ Define rescheduling process
 - ☐ Define holiday procedures
 - ☐ Prevent double-booking
-

29. CREATE CUSTOMER RECORDS

Maintain organized records for:

- ☐ Contact information
- ☐ Service addresses
- ☐ Service history
- ☐ Pricing
- ☐ Frequency
- ☐ Property details
- ☐ Special instructions
- ☐ Pets
- ☐ Access method
- ☐ Estimates
- ☐ Agreements

- ☐ Payments
- ☐ Complaints / issues
- ☐ Photos where appropriate

Protect sensitive customer information.

30. PREPARE TO HIRE

Before hiring employees or engaging workers, determine applicable legal, payroll, insurance, and classification requirements.

- ☐ Define job role
 - ☐ Create job description
 - ☐ Establish pay structure
 - ☐ Determine employment classification appropriately
 - ☐ Establish payroll
 - ☐ Review workers' compensation requirements
 - ☐ Create application process
 - ☐ Create structured interview process
 - ☐ Establish lawful screening procedures
 - ☐ Create onboarding process
 - ☐ Create employee records
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31. CREATE A CLEANER INTERVIEW PROCESS

- ☐ Standard interview questions
- ☐ Interview scorecard
- ☐ Reliability assessment
- ☐ Quality assessment
- ☐ Customer-service assessment
- ☐ Safety assessment
- ☐ Scenario questions
- ☐ Consistent hiring decision process

Use job-related criteria and comply with applicable employment law.

32. BUILD YOUR ONBOARDING PROCESS

- ☐ Company orientation
- ☐ Policies

- ☐ Scheduling
 - ☐ Attendance
 - ☐ Payroll / timekeeping
 - ☐ Customer privacy
 - ☐ Property security
 - ☐ Safety
 - ☐ Chemical procedures
 - ☐ Equipment
 - ☐ Cleaning procedures
 - ☐ Shadow shifts
 - ☐ Field-readiness assessment
-

33. BUILD YOUR TRAINING PROGRAM

Train and verify actual competencies.

- ☐ Cleaning fundamentals
- ☐ Kitchen procedures
- ☐ Bathroom procedures
- ☐ Bedroom procedures
- ☐ Floor care
- ☐ Detail cleaning
- ☐ Chemical knowledge
- ☐ Surface knowledge
- ☐ Equipment
- ☐ Customer service
- ☐ Property care
- ☐ Safety
- ☐ Time management
- ☐ Quality control

Do not assume onboarding alone makes a new cleaner field-ready.

34. CREATE TIMEKEEPING PROCEDURES

- ☐ Choose timekeeping method
- ☐ Track job time
- ☐ Track applicable travel time
- ☐ Track training / meeting time

- ☐ Track other compensable work
- ☐ Establish correction procedure
- ☐ Establish supervisor review
- ☐ Connect approved hours to payroll

Wage-and-hour requirements vary by jurisdiction.

35. CREATE QUALITY STANDARDS

Define what acceptable work looks like.

- ☐ Quality inspection checklist
 - ☐ Inspection scoring system
 - ☐ Passing score
 - ☐ Reclean process
 - ☐ Corrective-action process
 - ☐ Cleaner feedback process
 - ☐ Customer complaint process
 - ☐ Recurring issue tracking
-

36. CREATE YOUR OPERATING PROCEDURES

Document repeatable processes for:

- ☐ New leads
- ☐ Estimates
- ☐ Customer onboarding
- ☐ Scheduling
- ☐ Job preparation
- ☐ Cleaning execution
- ☐ Quality inspections
- ☐ Complaints
- ☐ Recleans
- ☐ Damage incidents
- ☐ Payments
- ☐ Hiring
- ☐ Employee onboarding
- ☐ Training
- ☐ Supply ordering
- ☐ Equipment maintenance

- ☐ Payroll
 - ☐ Customer cancellation
-

37. DEFINE YOUR KEY METRICS

Start tracking the numbers that tell you whether the business is working.

Sales

- ☐ Leads
- ☐ Estimates sent
- ☐ Estimates won
- ☐ Conversion rate
- ☐ Average job value

Operations

- ☐ Jobs completed
- ☐ Labor hours
- ☐ Revenue per labor hour
- ☐ On-time performance
- ☐ Reclean rate
- ☐ Inspection scores

Financial

- ☐ Revenue
- ☐ Direct labor cost
- ☐ Gross / contribution profit
- ☐ Profit margin
- ☐ Customer acquisition cost where measurable

Customer

- ☐ Recurring customers
 - ☐ Cancellations
 - ☐ Complaints
 - ☐ Reviews
 - ☐ Customer retention
-

38. KNOW YOUR BREAK-EVEN POINT

Estimate your monthly fixed operating costs.



Monthly Fixed Costs: \$

Estimate your contribution from cleaning services.

Average Contribution Per Job: \$

Approximate Jobs Needed to Cover Fixed Costs:

Review the calculation as your pricing and costs change.

39. CREATE A MONTHLY BUSINESS REVIEW

Every month, review:

- ☐ Revenue
- ☐ Expenses
- ☐ Profitability
- ☐ Cash position
- ☐ Leads
- ☐ Conversion
- ☐ Customer retention
- ☐ Labor utilization
- ☐ Cleaner performance
- ☐ Reclean rate
- ☐ Quality scores
- ☐ Reviews
- ☐ Marketing performance
- ☐ Outstanding invoices

Biggest Problem This Month

Priority for Next Month

40. PRE-LAUNCH TEST

Before taking your first customer:

- ☐ Business registration completed
- ☐ Required licenses reviewed
- ☐ Insurance active
- ☐ Business banking established
- ☐ Payment collection tested

- ☐ Services defined
 - ☐ Prices established
 - ☐ Checklists ready
 - ☐ Customer policies ready
 - ☐ Estimate / quote process ready
 - ☐ Scheduling process ready
 - ☐ Customer records ready
 - ☐ Cleaning products ready
 - ☐ Equipment ready
 - ☐ Safety procedures established
 - ☐ Website / contact method working
 - ☐ Test booking completed
 - ☐ Test job completed
 - ☐ Test payment completed
-

41. FIRST 30 DAYS

- ☐ Acquire first customers
 - ☐ Ask satisfied customers for reviews
 - ☐ Track actual labor time
 - ☐ Compare estimated vs. actual job time
 - ☐ Review job profitability
 - ☐ Adjust pricing where needed
 - ☐ Improve checklists
 - ☐ Document common customer questions
 - ☐ Improve estimate process
 - ☐ Track lead sources
 - ☐ Fix operational problems quickly
-

42. FIRST 90 DAYS

- ☐ Review pricing
- ☐ Review profitability
- ☐ Review customer acquisition
- ☐ Review recurring-customer growth
- ☐ Review quality issues
- ☐ Review scheduling efficiency

- ☐ Review service-area profitability
- ☐ Standardize successful processes
- ☐ Eliminate unprofitable services or pricing
- ☐ Determine next hiring needs
- ☐ Set next-quarter goals

BUSINESS LAUNCH SCORECARD

Area	Complete
Business Setup	☐
Banking & Accounting	☐
Insurance	☐
Services	☐
Pricing	☐
Estimates & Sales	☐
Customer Policies	☐
Equipment & Supplies	☐
Website & Marketing	☐
Scheduling	☐
Customer Management	☐
Hiring	☐
Training	☐
Quality Control	☐
Financial Tracking	☐

Overall Status

- ☐ Planning
- ☐ Setting Up
- ☐ Ready to Launch
- ☐ Launched
- ☐ Building Recurring Customers
- ☐ Ready to Hire / Grow

MY NEXT 5 ACTIONS

- 1.
- 2.
- 3.

- 4.
- 5.

IMPORTANT BUSINESS NOTICE

This checklist provides a general framework for planning and operating a cleaning business. It is not legal, tax, accounting, insurance, employment, workplace-safety, or regulatory advice.

Business registration, licensing, taxation, employment, worker classification, payroll, insurance, contracts, chemical safety, privacy, and other requirements vary by location and business activity.

Verify the requirements that apply to your business with the appropriate government agencies and qualified professionals.

TEMPLATE CUSTOMIZATION NOTICE

Not every item will apply to every cleaning company.

Use this checklist as a planning framework, remove irrelevant sections, add requirements specific to your market, and assign deadlines and owners to unfinished tasks.

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