

# The Ultimate Checklist for Running a Business Online in Canada



## Your Website

- Privacy Policy - You are required by law to have one.
- Copyright Notice - Protect the content on your website.
- Website Disclaimers - Use disclaimers to protect yourself
- Terms of Use - Set the ground rules for using your website



## Copyright Protection

- Identify assets in your business that can be protected by copyright.
- Use copyright notices on your content.
- Put clauses in your contracts that make it clear what content you own.



## Trademark Protection

- Identify assets in your business that can be protected by trademark.
- Consider registering your valuable brand assets so that they get full trademark protection (heads up this takes 12-18 months to complete the process).



## Email Marketing Rules

- Set up your Email Service Provider to comply with CASL anti-spam rules.
- Consider whether you need to comply with the EU legislation (the "GDPR") - generally marketing to EU.
- Think about how you can add email subscribers while complying the rules.



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## Client or Customer Contracts

- Consider whether your client contracts currently cover all of the necessary points to protect you and get paid.
- Think about how you can improve your process for getting contracts signed (on paper or digitally)
- Use your client questions and issues to improve contract.



## Hiring Contracts

- Think about who you will be hiring in the next 12-24 months.
- Consider whether you will be hiring contractors or employees - know the difference!
- Use contract templates when you do hire people to ensure you are on the same page.



## Online Course or Membership Agreements

- If you have created content that you are sharing or selling online, make sure that you are protecting it with an online course agreement.
- If you have a recurring membership, terms should include credit card authorization and cancellation.



## Legal Structures

- Choose the proper legal structure for your business considering liability protection and tax planning.
- If you decide to incorporate, understand your ongoing obligations including Registry filings and maintaining a corporate minute book.



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## Waivers

- Are there risks involved in the services that you provide to clients? Consider getting clients to sign a waiver so that they assume these risks and agree not to sue.
- Think about the process you will use to get waiver signed by clients before they start the service.



## Content Releases

- Determine where you use other people's photos, words or videos in your content.
- Get these people to sign a content release so that you can use their content in your marketing.
- When gathering testimonials from clients, get their consent and release to use.



## Online Communities

- If you have online communities like Facebook Groups, make sure you set out the rules for the members (even if the group is free).
- Include disclaimers in your group rules to protect your business from potential liability.



## Social Media Policy

- Make a social media policy for your business that will guide you and others that manage social media on behalf of your business.
- Ensure that you understand the terms of use of the social media platforms that you are using.
- Only post content that you own or have permission to share.

