

# ETHICAL PROFIT

## B Corporation Process Beginner Checklist

Below is a list of suggestions to help make the B Corporation process easier.

### Documentation strategies:

- Start by creating a folder labelled “B Corp Documentation” to add to as you go
- Add a shortcut to this folder to your desktop so you can quickly access it when needed
- Stick to a naming/filing convention to make finding documents easier i.e. “COMPANY NAME, Carbon Footprint Calc, YEAR” or “Energy Usage MONTH YEAR”
- Time-block compiling documentation so you aren’t distracted during the process, otherwise you may lose your place in calculations or train of thought and need to start over
- Ask your bookkeeper or accountant if they can add filters or tags in your finances to easily track local spending

### Assessment follow-through:

- Commit to a one-time two-hour block to go through the entire assessment (put it on your calendar)
- Pass on questions you don’t know the answer to or don’t have the information at the ready – you will update answers later
- Add “Assessment Follow Up” or “B Corp Assessment” to your To-Do list and calendar so you can review while it’s still fresh

### Getting to the 80-point benchmark:

- Review the assessment once complete to see where you can earn the most points or can earn some easy points (usually by creating or documenting policies)
- Review a carbon footprint calculator
- Consider changing your bank to a credit union
- B Corp provides many templates and examples of documents and ways to implement improvements, be sure to ask your employees to see if it could work for your company