

# Business Community Outreach Checklist

## The Basics

1. Purpose of the SOS in relation to business entity filings (ministerial vs. legal review)
2. Information that is filed goes on the public record
3. How to obtain certified copies
4. How to obtain/validate a certificate of existence or good standing
5. Welcome letter/next steps/congratulations
6. How your office sends reminders (what, when, to whom)
7. Entity dashboard or summary/homepage
8. FAQs, Chatbot
9. Office hours and contact information
10. Delivery information and processing times
11. Where to find forms list
12. Disclaimers on legal advice
13. Forms of payment accepted

Notes: \_\_\_\_\_  
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## Helpful Tips

1. Business identity theft
  - a. What your office is doing to help prevent it
  - b. Email notifications
  - c. Lock down business to certain users
2. Scam mailers
  - a. SOS comparison PDF
  - b. Scam examples (mailers, text, emails, etc....)
3. Saved payment or electronic wallet
4. Commercial registered agent dashboard
5. Share your top call types, rejection reasons, and common filing mistakes
6. eLearning or other training offered by organization
7. Other agencies to reference (Department of Revenue, Regulatory Affairs, Labor)
8. Department web links

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**Ongoing Responsibilities**

1. Requirements for reporting
  - a. Business entity reports
  - b. Change documents
  - c. Corrections
  - d. Amendments
2. Why and when businesses are administratively dissolved/delinquent
  - a. How to reinstate or cure (how long it takes and what it costs)
  - b. Deadlines for reinstatements
3. Importance of maintaining a current mail and email address with your office
4. Trade names vs. Trademarks

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**Potential Audiences**

1. Law Firms
2. Service Companies
3. Chambers of Commerce
4. Industry Associations
5. Better Business Bureau
6. State and Local Agencies
7. Veteran Organizations
8. Small Business Associations
9. Universities
10. Industry Conventions
11. Economic Development Organizations

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