

Cannabis Business Readiness Roadmap

A practical Business-in-a-Box checklist for building the infrastructure around your operation.



Opening a cannabis business takes more than a license.

Use this roadmap to see which pieces of your business infrastructure are ready, which are still in motion, and which conversations you may need to start next. Requirements vary by state, license type and business model.

Your business infrastructure at a glance

1 LICENSE	2 MONEY	3 PEOPLE	4 PROTECTION	5 SYSTEMS	6 OPERATIONS	7 GROWTH
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01 LICENSE & REGULATORY FOUNDATION

Know what must be true before the rest of the operation can move.

- ☐ License / application status is documented
- ☐ State and local requirements are mapped
- ☐ Required registrations and permits are tracked
- ☐ Compliance ownership is assigned

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

02 BANKING, CASH & TREASURY

Make sure money can move safely and predictably.

- ☐ Cannabis-friendly operating bank is established
- ☐ Payroll funding account / process is confirmed
- ☐ Cash handling and deposit procedures are defined
- ☐ Payment and treasury needs are mapped

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

03 ACCOUNTING, TAX & FINANCE

Build clean financial records before volume makes cleanup harder.

- ☐ CPA / accountant with relevant industry knowledge is identified
- ☐ Bookkeeping and chart of accounts are established
- ☐ Payroll-to-GL workflow is planned
- ☐ Tax strategy and recordkeeping responsibilities are clear

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

04 PAYROLL & WORKFORCE

Prepare to hire, onboard, pay and support people.

- ☐ Payroll provider is selected and implementation has started
- ☐ EIN, withholding and unemployment accounts are ready
- ☐ Onboarding, timekeeping and scheduling workflows are defined
- ☐ HR records, policies and employee access are planned

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

Protection, technology and day-to-day operations

These are the pieces that often become urgent only after employees, customers and revenue arrive. Getting the ownership and vendor conversations started earlier can reduce last-minute scrambling.

05 INSURANCE & RISK

Protect the business, the workforce and the people making decisions.

- ☐ Workers' compensation coverage is in place
- ☐ General / property / cyber coverage has been evaluated
- ☐ Employment practices coverage has been discussed
- ☐ Claims, incident and safety responsibilities are assigned

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

06 BENEFITS & RETIREMENT

Decide what your employee value proposition will include.

- ☐ Benefits strategy is defined
- ☐ Benefits administration process is selected
- ☐ Retirement / 401(k) options have been evaluated
- ☐ Eligibility, deductions and enrollment workflows are documented

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

07 TECHNOLOGY & DATA

Make systems work together instead of creating more manual work.

- ☐ POS / ERP / inventory systems are selected
- ☐ Accounting integration or GL export process is planned
- ☐ Time, scheduling and payroll data flow is mapped
- ☐ IT, hardware, access controls and cybersecurity ownership are assigned

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

08 PEOPLE, TRAINING & HR

Build repeatable processes before headcount grows.

- ☐ Recruiting / staffing plan is defined
- ☐ Job descriptions and compensation ranges are documented
- ☐ Required training and certifications are tracked
- ☐ Employee handbook / policies / acknowledgments are planned

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

09 FACILITY & PHYSICAL OPERATIONS

Connect the people plan to the place where work actually happens.

- ☐ Facility / buildout timeline is coordinated with hiring
- ☐ Fixtures, hardware and employee workstations are planned
- ☐ Security and access requirements are integrated into onboarding
- ☐ Opening-day staffing and manager coverage are mapped

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

10 OPERATIONS & COMPLIANCE SUPPORT

Know who you call when a requirement falls outside your team.

- ☐ Operational / compliance advisor is identified if needed
- ☐ License renewal and reporting responsibilities are assigned
- ☐ SOP ownership and update process are clear
- ☐ Specialized legal / regulatory resources are identified

STATUS ☐ NOT STARTED ☐ IN PROGRESS ☐ READY

THE GOAL IS NOT TO HAVE EVERY BOX CHECKED TODAY.

The goal is to know what is still open, who owns it and when it needs to be ready. A visible gap is easier to solve than an invisible one.

What still needs an owner?

Use this page to turn unfinished areas into conversations, deadlines and decisions.

Banking / treasury			
CPA / accounting			
Payroll / HR			
Insurance / workers' comp			
Benefits / retirement			
Technology / POS / IT			
Recruiting / training			
Compliance / operations			
Facility / buildout			
Other			

You do not have to find every resource alone.

Paragon's partner ecosystem extends beyond payroll.

If an area on this roadmap is still open, Paragon may be able to introduce you to established cannabis-focused resources across banking, accounting, insurance, retirement, benefits, technology, recruiting, training, compliance and other operational needs. Always evaluate any provider against your own requirements.

EXPLORE THE ECOSYSTEM

Partner Marketplace

Browse cannabis-focused business resources.

paragonpayroll.com/partnerships-marketplace

STILL LEARNING?

Learning Center

Keep researching payroll, HR and workforce questions.

paragonpayroll.com/learning-center

PLANNING PAYROLL COSTS?

Pricing Estimator

Get a quick estimate for your workforce.

paragonpayroll.com/pricingtool

WANT TO TALK IT THROUGH?

Let's Talk

Connect with the Paragon team when you are ready.

paragonpayroll.com/lets-talk

FOR THE PEOPLE BUILDING CANNABIS.

Payroll is one piece. The goal is a business infrastructure that can support your people, your operation and what comes next.

paragonpayroll.com