

AUTOMATING

# ONLINE BUSINESS



# Table of Contents

## **Chapter 1: Systemization – An Overview and Benefits**

- What is Systemization
- Why You Need to Systemize Your Online Business

## **Chapter 2: Begin from the Start – Making a List of Most Recurring Tasks**

- Step 1: Identifying Recurring Tasks
- Step 2: Organizing and Prioritizing the Functions
- Step 3: Developing Policies and Procedures
- Step 4: Documenting the Processes
- Step 5: Implement the Processes
- Step 6: Diagram the Flow of Your Business

## **Chapter 3: Systemization Tools for Your Online Business**

- Asana
- Ontraport
- Slack
- Deadline Funnel
- Lead Pages
- Calendly
- GoToWebinar
- DropBox
- Google Docs
- Google Calendar
- Webinar Jam
- Screencast-o-Matic
- HootSuite

- Infusionsoft
- MailChimp
- Needs
- Salesforce
- IFTTT

#### **Chapter 4: Documenting Your Processes – Creating SOPs**

- How to Document Your Business Systems
- Develop Naming Conventions
- Writing Your First Procedure
- Numbering the Steps in the Procedure
- Creating the Action Steps for Your Processes
- Implementing Your New Standard Operating Procedures
- Get Employee Buy-In

#### **Chapter 5: Outsourcing Your Tasks Effectively**

- Step 1: Identify Your Outsourcing Task
- Step 2: Write Your Project Description
- Step 3: Eliminate Unqualified Bids
- Step 4: Pick 3 to 5 Qualified Candidates
- Step 5: Pick the Most Qualified Freelancer

#### **Chapter 6: Automation Tools for Systemization**

- Zapier
- Flow
- Pipedrive
- TextExpander
- Alfred
- IFTTT
- Shortcut

- Robotask
- Tallyfy
- Intercom
- Delivra
- Autopilot
- mHelpDesk

## **Chapter 7: Scale-Up Your Business to the Next Level**

- Create the Right Strategic Plan
- Measure Effectiveness with Accounting
- Focus on Sales and Marketing
- Five Steps to Build a Baseline Lead-Generation System
- Implementing Marketing Controls
- Hire the Right People

## **Conclusion: The Final Words**

# **Chapter 1:**

## **Systemization – An Overview and Benefits**

The Internet has changed the way people think about companies, especially when it comes to owning a small business. Millions of people have tried to start an online business, with many of them finding success. While there are several reasons why one might fail to get their online business off the ground, one of the main reasons is because the owner was unable to systemize the company and utilize the available resources.

People who have found success with their online business know that they need a great idea, as well as the resources to cultivate a customer base for that great idea. They also understand that the same daily activities that are done in a brick and mortar business, also apply to an online business. They know that they will need to take the necessary steps to either learn those skills or outsource them to trusted and reliable sources is about combining the vision with the practicalities of the business world to become successful. The process of systemization is no great mystery. It is possible to learn how to effectively systemize your business and position yourself to run a successful online business that makes a profit on a consistent basis.

### **What is Systemization?**

Many online business owners, when they hear the word “systemization,” turn to the idea of an endless array of meetings that create a ton of action items that must be followed up on at the next meeting so even more action items can be created. In short, people believe that systemization is nothing more than an ongoing, convoluted series of processes that only make running a business more complicated. This couldn’t be further from the truth.

Having a systemized business doesn't mean that you'll be caught up in so many policies and procedures that you lose all ability to work on anything productive and it's not about filling time or creating the illusion of being busy. Systemization is not about creating a machine and being dominated by that machine. Systemizing your business doesn't have to be complicated.

True systemization is about creating a stable functioning procedure that knows what needs to be done, has a way to do it, and gets the job done. When you have a truly systemized business, you free up more of your time to focus on more important aspects of your business, like marketing, strategy, and product creation.

When your company is systemized correctly, the procedures make sense and always have a purpose. With systemization, everyone in the business knows what to do and when to do it. There are no endless meetings to deal with, no complicated policies to follow, and no time wasted with spinning the wheels.

This isn't to say that all the processes within an adequately systemized business are going to be fun. However, when organized properly, the tasks can be completed in a reasonable amount of time, leaving the rest of the day to work on something more interesting, like converting more prospects to buying customers, creating a new product line, or writing new sales copy. True business systemization, frees you, while a lack of systemization creates endless work and stifles your ability to succeed.

### **Why You Need to Systemize Your Online Business?**

There are many benefits that you can gain by systemizing your online business. With a sound system, people in your organization have a clear understanding of the work they need to perform and what is expected of them. Without policies, there are many unanswered questions, and quality

and service can't be guaranteed. Now that you understand why it's good to have a systemized business let's explore the benefits that you can gain.

### ***Reduce Costs***

Managing your email inbox or reading through piles of mail isn't the most efficient use of your time. As the business owner, your time would be better spent analyzing new business opportunities or developing new product lines. Delegating many of the day to day tasks that are required to run a business, can free up your time so you can focus your energy on the activities that will allow you to grow your business and increase revenues.

Without clearly documented business procedures, you can't delegate those daily tasks that eat up most of your time. By recording your processes, you can easily delegate tasks knowing that they will be done correctly, allowing you to free up your time to oversee more projects, which brings in more revenue for your growing business.

### ***Increase Efficiency***

Documenting procedures allows you to discover any unnecessary steps that you may be taking. When you record your systems, you provide yourself with the opportunity to improve the process, which can result in cutting costs and freeing up your valuable time to grow your business. It can also help you complete tasks with fewer mistakes. Taking the time to document new procedures and re-document existing procedures can provide you with opportunities to make the daily tasks more efficient and freeing up your time to focus on growing business revenue.

### ***Improve Performance***

Businesses that lack procedures often have employees that have their own way of handling tasks. While this can make your employees happy, it can also lead to inefficiencies. Not having documented procedures can lead your team to complete the same function in different ways. Recording the

best way to perform the task will allow everyone to become more efficient in his or her jobs and improve their performance.

### ***Improve Communication***

One of the biggest killers of time and profit in a business is miscommunication. When there are no documented procedures in place, internal and external communication becomes a huge issue. When you have clearly written procedures, there are fewer arguments over how things should be done.

### ***Scale Your Business***

Having procedures in place for training new staff will reduce the stress your current staff endures when training new team members. Following documented hiring procedures will allow you to hire the right people for each job and they'll be able to follow procedures without requiring additional assistance.

When your new hires receive better training, they can become more productive at their jobs. They can be trained in a way that reduces the number of mistakes being made and improve their overall performance. When your employees perform better, you can gain more sales and have fewer errors to deal with, ultimately cutting costs.

### ***Measure Your Progress***

While the money coming into your business is one way to measure your progress, being able to measure your marketing efforts or the development process of new products will provide you with a better picture of the health of your company. If your business is organized and has clear documentation of your procedures in place, you will be able to quickly check on these things, as well as other areas of concern and obtain real-time data on how they are doing.



## ***Meet Deadlines***

Without having a basic plan in place for each day, the daily activities that are needed to keep your business operating can begin to build up, eventually creating a bottleneck and bringing other essential tasks to a halt. For example, if you aren't posting your Accounts Receivables and Payables on a regular schedule, you can find yourself with a lot of work when it comes time to pay your employees or calculate taxes for the current quarter. Having an organized, well-documented system in place, ensures that you won't run into situations where you have to drop other tasks to play catch-up.

## ***Free up More Time***

When your business is systematic in its functions and operation, it frees up your time, so you can focus on the activities that will help your business grow. Instead of spending the afternoon responding to emails, you can work on your marketing efforts or promote your business at local business events. Business systemization provides you with the opportunity to spend your time on those endeavors without having to worry that your company operations have halted because you're away from the office.

## ***Take Time Off***

Being able to take time off from the business is one of the main benefits of a systemized business. When your business is systematically organized, you can take a vacation knowing that your company will still be able to run, even in your absence.

Now that you've been shown the many benefits of having a systemized online business, it's time to take a moment to evaluate your circumstance and make a list of what you want to accomplish with your online business. Write everything down, no matter how small, vague, or inconsequential it may seem.

One of the easiest ways to become burned out before your business even has a chance to succeed is trying to master everything yourself and doing it all. No matter how good you are, this line of thinking is just not realistic. Developing a logical and workable business system will allow you to build and run a successful online business.

# **Chapter 2:**

## **Begin from the Start – Making a List of Most Recurring Tasks**

Whether you already own an online business and find yourself constantly exhausted from the daily work, or you are planning on opening an online business in the future, there is still plenty of time for you to get into the swing of systemizing your business. Once you start working on the steps outlined in this guide, you may begin to realize that many of them are simply common sense.

### **Step One: Identifying Recurring Tasks**

To start systemizing your business, you need to begin by listing all the general functions that you do both daily and through the course of the week. It doesn't matter if you are a brick and mortar business, an online business, or a hybrid business that involves an Internet presence as well as a physical site. Here are some of the more common tasks that will apply to every business.

#### ***Accounting***

When it comes to your business's income and expenses, you have to create some sort of process for keeping track of what comes in and what goes out. Having business systems in place for your accounting tasks will allow you to ensure that you are profitable, as well as making sure you have the appropriate records to back up your tax filings, that you have paid your vendors, and that your customers are paying you within your set terms. It is also essential to make sure that your paying your employees on time and have the right amount of taxes being deducted from their pay.

This is one of the systems in your business that you have to keep a close eye on. However, this doesn't mean that you have to do the work yourself.

Financial management systems will allow you to keep track of everything from tracking credit card purchases to invoicing clients, to following up on past-due accounts. Here are some of the other accounting systems that can be systemized.

- Purchasing
- Tracking credit card purchases
- Accounts payable
- Accounts receivable
- Deposits to the bank
- Cutting checks
- Payments on taxes
- Profit and loss statements
- Invoicing
- Daily cash out
- Petty cash
- Employee expenses
- Payroll

Putting these systems in place will help to prevent employee theft and allow you to have a clear picture of your business's numbers. They will allow you to control your purchasing and ensure that you sign-off on each decision that is made.

## ***Administration***

Somebody has to ensure that the day to day tasks are being accomplished. Depending on the size of your business, this may involve a central manager or supervisor, or several managers who oversee one or more departments.

Administration is an essential area of your business to systemize because of the high turnover rate that most administrative roles see.

Implementing a series of systems can help to reduce training time and keep you from having to explain to new hires how the phone needs to be answered every time a new employee joins the team. Here are the administrative tasks that should be systemized.

- Opening and closing procedures
- Phone greeting
- Mail processing
- Office maintenance
- Filing
- Paper management
- Document production
- Inventory management
- Order processing
- Creating orders

## ***Marketing***

No matter how good your products are unless people know that are around, there is no chance of ever getting your online business off the ground.

Marketing involves creating strategies, learning how to reach niche

markets, how to position your product, writing compelling marketing copy and general marketing collateral. Marketing your business is probably one of the areas where you spend most of your time. You are most likely focusing your efforts on generating new leads and getting more people to call you. These efforts can be efficiently systemized and delegated to other members of your staff. Here are some other marketing systems that you can systemize.

- Promotions
- Marketing calendar
- Advertising
- Direct mail
- Advertising creation system
- Social media
- Content creation
- SEO systems
- Newsletter templates

You can use systemization to create simple systems for your business's primary promotional efforts. Any of your team should be able to pick up your marketing manual and implement a successful email marketing campaign or create a purposeful advertisement.

## ***Sales***

Many people tend to lump sales and marketing together. However, to create a truly systemized business, they must be treated as different functions within the company. While marketing is about getting the general word out about your business, sales are about following leads and

converting prospects into paying customers. Some of the sales systems that you can systemize are as follows:

- Referral program
- Customer retention
- Sales procedures
- Lead generation
- Lead management
- Sales script

### ***Technology and Data***

It is almost impossible to operate any kind of business without having reliable resources in place that can help you keep your website functioning correctly, your servers running, and your workstations from losing critical data. Your business needs to have clear systems in place for managing both your paper and electronic organization to ensure that your sensitive business information is protected and easily accessible.

Implementing data management systems in your business will help you stay organized. When everyone on your team knows where information is supposed to be stored and how it should be handled, you can reduce enormous stacks of paper from forming around the office. Here are some other data management systems that can be systemized to ensure your business continues to run.

- IT management
- Data backup
- Computer repairs

- Electronic information storage
- Client files
- Project files
- Point of sales system
- Financial data management

You need to ensure that your data management systems include a data backup system. This will ensure your data and business are protected in the event something happens to your server or computer software.

### ***Human Resources***

Even if you only have one other person involved in your online business, someone has to make sure that you are functioning within the guidelines and regulations that apply to the kind of business you are running.

Managing HR policies and procedures can get very involved, so it is essential that this particular function is controlled by someone else who has an eye for detail and who can assimilate a lot of data.

Along with creating systems for hiring, firing, and training employees, your HR systems will include documented processes for the following:

- Recruitment
- Retention
- Incentive programs
- Employee reviews
- Employee feedback process
- Employee training
- Professional development



- Ongoing training
- Job descriptions and role profiles
- Uniforms and dress code

Employees with clear expectations and clear structures are happier and more productive in their positions. Establishing a clear training manual will save you the time of training each new staff member.

### ***Communication***

Communication is an essential aspect of any business and is often one of the most time-consuming pieces. Sales letters, fax cover letters, internal memos, newsletters, and reports are all types of communications that need to be created on a regular basis by different people within the organization.

Most of the time the communication systems that you use in your business aren't much different from one to the next. However, each one is created by a different person, from scratch. Your communication systems provide a massive opportunity for systemization. Systemizing these communication systems ensures that you will have consistency in your business.

- Internal memos
- Fax cover template
- Letterhead
- Team meeting agenda
- Internal emails
- Newsletter templates
- Sales letter templates
- Meeting minutes

- Reports
- Internal meetings
- Scheduling

### ***Customer Relations***

Another critical area that you need to consider systemizing is your customer relations. This includes everything that a customer sees and touches in your business, along with the interactions they will have with your staff.

Establishing a system for your customer relations will ensure that any new employees will understand how your business handles customers. This allows you to maintain a high level of customer service. These customer relations systems are perfect for getting your business systemized.

- Incoming phone call script
- Outgoing phone call script
- Customer service standards
- Customer retention strategy
- Customer communications
- Ongoing customer communication strategy
- Customer liaison policies

### ***Purchasing***

No matter how lean you run your online business, you will be required to purchase items for your business from time to time. While you may only be buying general office supplies, a software program from time to time, or promotional materials, having a process in place can ensure that you never

run out of the items that you need. Some of the purchasing systems that you can systemize include:

- Inventory
- General supply orders
- Shipping materials
- Evaluating pricing
- Policy compliance
- Filing paperwork

It is essential to have someone in your company that is capable of establishing relationships with your vendors and can maintain the rapport to ensure that you are getting the best prices on the goods and services that you are purchasing.

Your initial list needs to encompass all of the essential functions that are related to operating your business. Once you have the list in place, you can begin the next step of the process.

## **Step Two: Organizing and Prioritizing the Functions**

Once you've identified all the recurring tasks in your business, it is time for you to organize and prioritize those functions. Depending on the size of your business, you might be able to combine some of the tasks into a single, general category, as long as your business remains relatively small. It's also important to remember that you can always split categories later on as it becomes necessary. Here are some examples of how you can prioritize your essential business functions.

### ***Product Development***

Before you can even start a business, you need to have a core product or service that you can offer to potential customers. This makes product development one of the most critical functions in your business and thus should be placed at the top of your priority list. Product development is likely to continue to remain high throughout the course of business since you will need to continually improve and refine your product over time for it to stay competitive in your market. Coming up with new products that will compliment your core line will also be a function that you will have to perform throughout your time in business.

### ***Administration and Accounting***

For small businesses, combining the administration and accounting functions makes sense. You can hire a single office manager who can take care of the day to day clerical tasks as well as posting credits and debits to the books. As your company expands, you can split these two functions into separate teams. Before you can start selling your product or services, these two areas of your business must be structured and in place.

### ***Tech Support***

You can't successfully run an online business if you don't have a functioning website or if you have problems with your equipment. Having someone who knows how to build and manage a site and keep your equipment running is essential to have in place before you make your first sale.

### ***Sales, Marketing, and Customer Support***

When you are first starting your online business, these business functions can be combined and handled by one or two people. Over time, as your business gets off the ground and continues to grow, you will need to split these functions into their own department and have separate policies documented for the processes that go along with each task.

After you've analyzed your list and prioritized the functions according to their importance and need for getting your business up and running, the next step is developing the policies and procedures that will be essential for keeping your business running, even when you aren't in the office.

### **Step 3: Developing Policies and Procedures**

When you have your priorities in order, it's time for you to begin developing the policies and procedures that will be at the core of your business. These policies and procedures will keep each of the essential functions of your business running smoothly so you can focus your time and effort on growing your business. It is necessary for you to keep in mind as you work through this step, that even if you are combining several functions under one umbrella initially, that each of these functions must be clearly defined with their own specific processes and responsibilities.

Developing policies and procedures is nothing more than creating a logical process that can be documented in a training manual. They must be as relevant for a team of three as they would be for a group of three hundred. Here are some examples to help you begin crafting the procedures for each of the essential functions of your business.

#### ***Accounting***

You should have policies in place that include guidelines to how frequently posting should be done to Payables and Receivables, when taxes should be determined, how to handle employee payroll, and how to track expenses.

#### ***Administration***

The administration policies and procedures should include guidelines on how to schedule employees, how to draft letters and general

correspondences, how to arrange and maintain the filing system, booking travel for department personnel, and ordering office supplies.

### ***Sales, Marketing, and Customer Support***

The sales, marketing, and customer support departments will need to have clearly defined instructions on how to interact with the public. Marketing will need guidelines for how to create compelling ads that appeal to consumers while the Sales and Customer Support departments will be representing the company when approaching prospective customers and taking care of existing ones.

### **Step Four: Documenting the Processes**

For your business systems to work correctly, they need to be clearly documented so that there is no opportunity for miscommunication or confusion on what should be done in any given situation. While recording your processes and procedures can be intimidating, there are some excellent resources for managing this.

Your new hires, presumably, will have some experience in the area where they will work. Draw on this experience to help you create the policies and procedures for your business. To cut down on the time you spend writing down the processes, turn to templates and samples found on the internet or obtained from other companies. There is no point in your spending your valuable time reinventing the wheel. A lot of the information that you need has already been written and can be customized to work for your company with minimal effort on your part.

If you genuinely don't have the time or resources in your company to help you document your policies and procedures, you can always hire a business consultant to help you create a training manual and a workable employee manual. The money you spend on this type of service will be well worth it in the long run.

## **Step Five: Implement the Processes**

Once you have started documenting your processes and procedures, you'll want to take them for a test drive. Start implementing the processes to determine if the basic structure is sound. Don't be upset if you run into bumps along the way, no business, no matter the size, gets it completely right the first time. As you do a test run on the processes, consider whether the process has the potential to be tweaked along the way to ensure that your company is capable of running smoothly when you're away.

As your company grows, you will find it necessary to add positions to various departments, adjust policies and procedures to accommodate new laws and regulations, or create new departments by splitting older ones. If your primary system is sound, these new developments in your company will be relatively painless to deal with and won't require you to overhaul the way you do business entirely.

## **Step Six: Diagram the Flow of Your Business**

It isn't enough for you to merely identify and prioritize the functions in your business. You also need to ensure that there is a logical ebb and flow between each of these essential areas.

While this may seem redundant once you've figured out what each department is supposed to do, you can think of it as creating the jewels that go into the necklace. They may be beautiful in their own right, but if they aren't correctly linked, nobody can wear them.

Here are some ideas to help you with the diagramming and definition of the communication flow within your business.

- Start with diagramming how things flow through each department. For example, a new customer order begins with Sales, makes its way to Order Processing, then finds its way to Shipping, and finally ends with billing. At some point, Customer Support will need to be

involved in following up and making sure the customer is happy with their purchase.

- Next, identify who is responsible or accountable for each progression in the flow.
- Evaluate how long it takes for the flow of the order to make its way through the process and determine if any areas need improvement.

Taking the time to diagram the various processes will help you in a couple of ways. First, it will make it clear whether or not the policies and procedures that you have implemented are working correctly. Secondly, it will help you and your team spot any areas where you can improve communication, more clearly define procedures, and which steps can be streamlined to save you both time and money.

While this may seem like a great deal of work, it is relatively easy to accomplish. The degree of detail and time that you spend developing these procedures will depend on the size and nature of your business.

While some of the steps will be able to be completed in a matter of minutes, others will take days or weeks to accomplish. Building a solid foundation when you are first starting your business will save you a considerable amount of time and money once you have your company up and running.



# Chapter 3:

## Systemization Tools for Your Online Business

If you want to build a successful business that is capable of generating steady, predictable sales, then you need to develop systems that will allow your business to continue to run even when you're not in the office. If you are feeling stressed by the overwhelming number of tasks, email, projects, clients, and social media marketing that you are tackling on a daily basis, several tools can automate your tasks and free up your time.

The following tools will help you to automate many of the essential daily tasks that are required to run a successful business. By utilizing some of these tools you can free up your time, so you can be more productive and focus on those tasks that you need to work on.

### **Asana**

Asana (<https://asana.com>), is a tool that helps you move your work forward. It is the easiest way for your team to track their work and get results. Asana can help you free up your email because any conversation that you have with your team happens in the app. While asana was designed to be used by organizations, individuals running their own business can also benefit from utilizing the tool in their business. Here are a few highlights that make this an excellent tool if you're trying to systemize your business.

- It splits your “to do” list into actionable tasks based on when those tasks are due, who was allocated to work on the project, and by the project themselves. This feature will allow you to collaborate on larger projects with your team or focus on small, individual tasks.

- It allows you to delegate tasks more efficiently.
- It works with Google Drive and Dropbox, so you can easily share files within the project.
- It's free.

## **Ontraport**

Ontraport (<https://ontraport.com>) is an all-in-one business automation tool that brings together all your business tools, customer information, and data into a single application. It is a true marketing automation system that will allow you to market your business using email, postcards, SMS, and more. It also has a feature that will enable you to sell your programs, products, and services seamlessly with a payment processing option for PayPal or the merchant provider for your business. Here are just a few of the reasons why Ontraport is a great automation tool for your business.

- It allows you to map your entire customer journey. While most marketing tools show you either how your email performs or how your pages convert, Ontraport shows how your whole business performs on one single campaign map.
- You can see who's converting when, where they are coming from, and their lifetime value through the tools campaign reporting feature. The data you receive can then be tied back to your marketing activity, so you know which campaigns are working.
- It allows you to build your campaign from scratch or choose a campaign from its vast library of turn-key templates that include emails, pre-designed pages, and everything else you need to launch your campaign.

## **Slack**

Slack (<https://slack.com>), is a business tool that allows your team to kick off a project, hire new employees, review a sales contract, finalize your budget, measure and A/B test, and more; all from its easy to use interface. The program will help you save time when collaborating with your team by providing you a single place for messaging, files, and tools. Here are just some of the features that Slack has to offer your business.

- Organized conversations, utilizing channels to bring conversations together. The channels can be organized by team, project, or client and allow team members to join and leave any channel as needed. It also features threads that keep side conversations from derailing the project or topic at hand.
- Slack also allows you to search conversations and turn them into common knowledge. Users can explore everything that has been posted in channels to see if their problem has already been solved.

## **Deadline Funnel**

Deadline Funnel (<https://deadlinefunnel.com>) is a program that will allow you to sell your programs live through webinars, as well as allowing your customers to enter into mini-launches, which are fully automated, using timers that countdown to the expiration of the cart. The countdown timers that deadline funnel uses are personalized to each visitor, allowing you to add a sense of urgency to your marketing funnel. With deadline funnel, you can build real, evergreen campaigns that provide each of your subscribers with their own deadline. Here are several reasons why businesses utilize deadline funnel in their companies.

- You can create deadline campaigns for your product launches, with the ability to set the same deadline for everyone.

- It integrates with several powerful business systems including ActiveCampaign, HubSpot, MailChimp, and Ontraport.

## **Lead Pages**

Lead Pages (<https://leadpages.net>) helps businesses to build stunning opt-in campaigns easily allowing them to quickly capture leads, convert customers, and integrate their campaigns across all their favorite digital marketing tools.

- Create mobile friendly templates that seamlessly adapt to your audiences favorite connected devices.
- Easily build ads with the integrate Facebook Ad Builder that pulls content directly from your page to create compelling ads instantly.
- Fine-tune your campaigns quickly and create maximum impact by testing multiple versions of the ad, side-by-side, so you can keep what works and get rid of what doesn't.

## **Calendly**

Calendly (<https://calendly.com>) helps businesses schedule meetings without the back-and-forth emails. Calendly allows you to create simple rules and share your Calendly through links via email or embedded in your website. Calendly works with your Outlook, Google, iCloud, or Office 365 calendars, so you never become double booked. Here are some of the features in Calendly that business owners love.

- They have complete control over their schedule. The program allows you to set buffer times between meetings, prevent last-minute meetings, create secret events, and more.

- The program is extremely flexible and supports joint availability meetings, round-robin meetings, and one-on-one meetings.
- It works with all your favorite business apps like Salesforce, GoToMeeting, Zapier, and much more.

## **GoToWebinar**

Webinars have become a massive part of many online businesses. GoToWebinar (<https://gotomeeting.com>) lets you quickly and more efficiently communicate with employees, prospects, and customers. It can easily handle large groups of people and turn your presentation into a conversation and the conversation into sales.

Both large corporations and small businesses can tell their story with GoToWebinar and reach their audience. The following features make GoToWebinar an indispensable tool for any business.

- The email automation feature allows users to create custom email invitations, confirmations, and reminders. With automated email templates, you can let the tool do all the work for you.
- To indeed make the webinar yours, GoToWebinar allows you to display your company logo and custom image on all the material used in your webinars.
- Add the ability to share videos to make your webinars more impactful. Upload MP4 files or share video clips on YouTube or share a promotional video and more with high-quality video.

## **DropBox**

With Dropbox (<https://dropbox.com>) business, you can grow your company without limits, while maintaining complete control over your company's sensitive data and other activities. Flexible storage plans and

team storage management are just some of the features of the powerful file sharing business tool.

- With the administrator dashboard, you can monitor team activity, view connected devices, and audit sharing activity from one place.
- The remote wipe feature allows you to clear files from lost or stolen devices to ensure that all your company files are kept from getting into the wrong hands.
- The Dropbox paper feature is a simple, yet powerful way to create, share, and keep all the members of your team in sync, with the added benefit of admin controls.

## **Google Docs**

Google Docs (<https://docs.google.com>) is a robust document sharing and editing tool that allows team members to work on documents in real time. With immediate syncing capabilities, the program reduces the chances that someone will over-ride someone else's contribution. Google Docs brings all your business documents to life with smart editing and styling tools that make it easy to format text and paragraphs. Other features include:

- Hundreds of templates that are designed to make your work more professional and your life much more comfortable. With a wide variety of report, resume, and other pre-made documents you can get a head start on all your document creation needs.
- Since Google Docs is a web-based tool, you can get all your documents anytime and from anywhere. You and your entire team can access, create, and edit documents from your favorite devices, even if there isn't a connection.

- All the changes that are made in documents are automatically saved as you type. The program also keeps the revision history, so you can quickly view old versions of the report and sort the changes by the date they were made or who made the change.

## **Google Calendar**

Make the most out of your days with Google Calendar

(<https://calendar.google.com>). The newly designed app helps you spend less time managing your schedule and more time enjoying it. All of the events that you add to Google Calendar are stored online so you won't lose your schedule if you happen to lose your phone.

- With the assists feature, you can create events in just a few taps. With smart suggest, you can quickly and easily generate event titles, add people, and places to your calendar.
- Get multiple views of your day, week, and month. Easily invite guests to your events and view your calendar on the web.
- Events from your Gmail account are automatically added to your calendar.

## **Webinar Jam**

Webinar Jam (<https://webinarjam.com>) offers business owners unmatched flexibility and high-tech precision at a value that can't be matched. With the ability to invite up to six co-presenters Webinar Jammer is one of the best collaboration tools on the market. The program is compatible with all browsers, operating systems, and devices, making it easy for anyone to attend your webinar.

- Draw and mark up directly on your screen and turn your whiteboard ideas into reality. You can quickly highlight and write annotations on

the screen as you run presentations, training, software demos, lectures, or share mind maps.

## **ScreenCast-o-Matic**

With ScreenCast-o-Matic (<https://screencast-o-matic.com>) you have everything you need to create, manage, and share videos with your team. The integrations allow you to use the platform end to end or as video editing and screen recording tools. ScreenCast-o-Matic is an intuitive, powerful screen recording and video editing tool for businesses of all sizes.

- It features an advanced screen recorder to capture your screen or webcam while you add text annotations, shapes, or draw freehand. You can also import or export and mix in other video and audio media seamlessly.
- With advanced video management and sharing, you can efficiently manage all of your videos and how they are viewed. Quickly set up channels by topic, set user options like comments and notes, and set permissions for who can see the videos.
- Easily integrate your workflow into your training, communications, support, and learning management system with API.

## **HootSuite**

Do more with your social media with HootSuite (<https://hootsuite.com>). HootSuite is dedicated to not only enhancing your social media engagement but helping you automate it across more than 35 global networks like Twitter and Facebook. It identifies the social media influences in your industry and automates social media strategies for you.

- Save valuable time by scheduling all your social posts through an easy to use interface. Keep your business's social presence active



around the clock by automatically scheduling hundreds of social media posts at once.

- Track and prove your social return on investment (ROI) with the programs social analytics feature. Quickly measure the impact of your social media campaigns with comprehensive reporting. Measure each social channel's conversion rates and separate ROI between paid and owned media.

## **Infusionsoft**

Infusionsoft (<https://infusionsoft.com>) is an all-in-one marketing solution specifically designed to help small businesses. It allows you to automate lead scoring and capture and a segment with the tool's powerful customer relationship management (CRM), features. Quickly integrate with hundreds of third-party business services through the expansive marketplace of apps.

- Get more organized with Infusionsoft. All of your customer information is gathered in one place, which allows you to review all of your previous customer interactions quickly. The simple dashboards and reports show you exactly how your audience is responding to your campaigns.
- Get more customers by creating follow-up email campaigns that are targeted to your customers.
- The marketing automation feature allows you to work leads down the sales funnel and build a sales pipeline that works. With easy to read analytics you can quickly see what's working and what's not.

## **MailChimp**

MailChimp's (<https://mailchimp.com>) primary focus is on email marketing and is one of the most affordable automation tools on the

market. Its marketing automation features allow you to target customers based on specific data. Create customer workflows with scheduling and segmentation tools with their application program interfaces (API), and it easily integrates with numerous Web technologies.

- Connect your store to one of the hundreds of e-commerce integrations offered by MailChimp to create targeted email and ad campaigns.
- The robust marketing automation in Mailchimp ensures that your emails are getting in front of the right people at the right time. It allows you to target customers based on preferences, behavior, and previous sales.
- Reach a wider audience with Facebook, Google, and Instagram ads to grow your bottom line in fewer steps.

## **Needls**

Automatically create, target, and optimize all your digital advertising with Needls (<https://needls.com>). All you have to do to get started is upload your images, videos, and primary message, and let Needls do the rest for you. Stop spending hours trying to come up with the perfect ad. Arm yourself with all the tools you need to turn your visitors into sales.

- Needls will quickly identify your ideal customer as they post their wants and needs to their social media accounts and then display timely ads, so you have the best chance of gaining their business.
- Automatically optimize and retarget your ads, 24/7, 365 days a year.
- Create simple, high converting landing pages that capture more sales, inquiries, and phone calls.

## **Salesforce**

One of the leading business automation and customer relations management companies in the world, Salesforce (<https://salesforce.com>) can be leveraged by businesses to enhance your digital marketing campaigns. The powerful marketing and sales automation tools can integrate with hundreds of third-party business apps through its vast market of APIs.

- Manage all your contacts and track opportunities from any desktop or device.
- With predictive scoring, actionable insights, accurate forecasting, and intelligent automation turn your customer data into closed deals with Sales Cloud Einstein.
- Build a single, comprehensive view of every one of your consumers to power one-to-one journeys.

## **IFTTT**

Standing for “If This Then That,” IFTTT (<https://ifttt.com>) is a streamlined automation tool that allows businesses to create recipes that perform specific actions based on triggers that are predefined. There are currently more than 240 third-party app connections for you to automate your business across the web.

- Get all your apps and devices talking to each other in new ways with a touch of a button.

These automation technologies enable you to free up the time you spend on completing redundant processes, so you can start to focus your attention on those tasks that are needed to grow your business. With the team collaboration tools and tools for documenting, you can easily stay on top of projects and work seamlessly with your employees, no matter where they are located.

# **Chapter 4:**

## **Documenting Your Processes – Creating SOPs**

To truly systemize your business and ensure that it continues to run smoothly, you have to document your processes and create a Standard Operation Procedures Manual, or SOP. Standard operating procedures are an essential part of the operating system for any company. The idea is a simple one and is used by the US military and successful businesses like McDonald's.

The SOP guidelines are created to facilitate the entire way that you do business. They are designed to make things run smoother and more effortless and help to prevent costly mistakes from occurring. Not only do SOPs simplify and formalize every task in your business, but they also make it, so no process in your company rests solely in the hands of a single member of your team.

The lack of SOPs in your business creates a condition that if key people were to leave, their knowledge and expertise wouldn't disappear with them. Without these systems in place, you are running the risk that your business may eventually be crippled because you have an operational reliance on the expertise of a handful of individuals who are the only ones who know the “secret sauce” of your business model. Having SOPs in place means you won't have to worry that the loss of key people could cripple your business.

### **How to Document Your Business Systems**

When documenting your business systems and creating an SOP, it is essential to include both how the task is done and the reason why the task

is done and the importance of the task to the overall success of the business. Your employees must understand that no matter how menial they might think a function is, it is, in fact, an essential part of the overall design for the success of the business. The initial draft of each procedure should include the following:

- The Title of the SOP
- The reason for the SOP
- The specific action steps that are required to complete the task

These three items must be covered in the draft for the process to be successful. The method of drafting the document is simple. You want to think about it as having a conversation with a person that you want to complete the task. You are essentially having a written communication and covering every step of the process from inception to completion. You may find it helpful to include photos in the document. Illustrating the tasks could be essential for the person to be able to comprehend the task. Videos of the process can also prove to be helpful in showing a multi-step process. Your goal, when documenting your methods is to completely illustrate the task to eliminate any potential questions that might be raised as to the how and why.

### **Develop Naming Conventions**

The first thing you need to do before you even put pen to paper, is to develop a standardized naming convention for the documents you are going to create. Having a standardized naming convention will allow you to remain consistent and will make it easier for employees to find the correct material. While you may only have a few documented procedures to start with, as your business grows, so will your SOP. Here are some tips for developing naming conventions that will help you control how procedures are written, reviewed, published and archived.

## ***What are Naming Conventions?***

Simply put, naming conventions are how you name your documents in a structured manner. The key is to have consistency across the SOPs. Your primary goal in adopting a naming convention is so that you and others can quickly identify the type and purpose of all the SOP documents. You want to make sure you use a naming convention that is easy to follow, understood by everyone in your team, and that is meaningful. You want to avoid using obscure or cryptic terms because if they aren't practical, those tasked with writing the SOPs may stop using the guidelines. The following are important guidelines that you should follow for naming your SOP documents.

- Client Name or SOP Document Owner - e.g., RAM
- Project Name – e.g., PUR for Purchasing or ADM for Administration
- SOP to show that it is a standard operating procedure
- Abbreviated Title – e.g., ReceivingProducts
- Version Number – e.g., v1\_0, v1\_1, v2\_0
- Document Number – e.g., 21

Using these guidelines, the official name of the SOP would look like this:

RAM\_PUR\_SOP\_ReceivingProducts\_v1\_1\_21

Before you start writing your SOPs, it's essential that you give some thought to how they will be managed in the future. You need to consider how hundreds of documents, with different versions, and status controls will be managed. Be sure to create meaningful conventions and document them so that if someone takes over the process of creating SOPs, he or she will be able to use the same standards and keep your documents uniform.

## Writing Your First Procedure

Your standard operating procedures are nothing more than instructions for completing a given task. To fully understand the process that you're documenting, you need to put yourself in the shoes of those who will be performing the task and write the document from their perspective. When you start recording your procedures, you'll want to keep the following in mind.

- Write in the present tense. Keep in mind that the person who is following the procedure is performing the task now.
- Avoid being vague with your instructions.
- Be concise.
- Get to the point and keep the words short.
- Keep the steps in a logical order. Steps should follow each other logically.
- Highlight any exceptions. You can use a symbol to flag the exceptions and how to go about handling those exceptions.
- Highlight warnings. Warnings that the user must use caution when performing the task, have to stand out. If you have warnings in your procedures, use a larger font or different color to highlight these areas.
- Include the meaning of acronyms before placing them in the text.
- Number each step in the process.

Finally, the process of writing your SOP requires you to consider all the action steps in the procedure and perform a risk assessment before any work can begin.

### **Numbering the Steps in the Procedure**

Every procedure should list all the actions that need to be done to complete the task. To keep things simple, record the action steps in sequential order, starting at 1 and continue working upward. The most critical aspect of numbering the actions steps is keeping the style consistent. Don't change styles in the middle of creating your SOP.

By numbering each step in the procedure, you ensure that the reader will start in the correct place and it removes any ambiguity or misunderstanding that could happen if you don't number the steps. Numbering also ensures that there is an agreed upon way for all employees to perform the same task.

### **Creating the Action Steps for Your Processes**

The action steps are nothing more than the individual steps that are performed in each procedure. Most of the systems that you will document will be presented as a sequence. However, you also need to consider other factors, like multiple choices when performing a task, any secondary functions that may need to be completed, and other related procedures. To finalize the system, it can help to put it in context. You want to consider where the system occurs in the larger scheme of things and if there is anything the user should complete before getting started and things that should be avoided.

### ***Procedures for Creating Action Steps***

1. **Include a summary sentence.** Before you write any steps in your procedure, you will want to open with a summary sentence that explains what will be achieved by performing the process. The



summary sentence helps to orient the reader, so they know with a quick glance if they are on the correct page. You want to keep the summary sentence short and concise. Below is an example of a summary sentence for receiving products.

*When receiving products, there are several steps that you must take to ensure the correct quantity of products have been delivered and that the number of products ordered, accepted, and paid for are accurately reflected on the invoice.*

- 2. Identify the main task.** In the procedure heading, you will need to identify the primary task. Identifying the main task defines the starting point for the procedure. It should be written using a verb that ends in ING. For example:

### ***Receiving Product Orders***

- 3. Write out the action steps.** Clearly write out each step in the procedure, making sure that each step is numbered in sequential order.

- 1. To verify that the items that are being received match what was ordered, you need to perform the following checks.*
- 2. Confirm the product quality matches your product's specifications.*
- 3. If everything meets your expectations, accept the order by signing the invoice. If you are not satisfied with any of the product, follow the procedure for rejecting product and request a credit memo for the product you are refusing.*
- 4. Once you have accepted the order, move the product to storage. You will need to deal with all refrigerated and frozen products first.*

**4. Include any sub-steps.** If the procedure requires a series of options, instead of continuing with the numbering, you'll want to create sub steps, for example, 1.a, 1.b and 1.c. This helps the reader see that these steps occur under step number 1. To highlight this even further, indent each sub-step like the example below.

*1. To verify that the items that are being received match what was ordered, you need to perform the following checks.*

*a. Check the product quantity and weight to ensure that the amount that is stated on the invoice matches the order that you are receiving.*

*b. Check the product unit price to ensure that the unit price on the invoice matches the unit price on the purchase order.*

**5. Identify secondary tasks.** Identify any secondary functions that might need to either be performed with the primary task or if the task is complicated, the second series of steps. This shows the reader that the procedure is really two parts, preparing them for what's coming up.

**6. Include warnings and notes.** You want to be sure to highlight any potential risks that the reader may encounter while performing the task and any notes to provide the reader with more information. For example, if dangerous equipment is being used to complete the procedure highlight those dangers using icons to make them stand out.

**7. Include Related Information.** Each procedure is a part of something larger; no one system stands alone. At the end of each process, create a "For More Information" section that lists any related process.

***For More Information:***

*Checking Temperatures of Key Items*

*Storing Products*

## *Chemical Storage*

### *Rotating Products*

Your goal is to ensure that the reader has enough information to complete the task without having to ask for help or look at another document. One of the challenges that you will face when writing your procedures is being able to determine the readers' experience and knowledge of the system. Here is what a process for creating a sales receipt in QuickBooks would look like.

### **Creating Sales Receipts**

1. Open QuickBooks
2. On the QuickBooks homepage, select the "Create Sales Receipt" icon.
3. Track the sale by entering a customer or job name into the space designated "Customer Job."
  - a. For existing customers, use the arrow next to the space to select an existing customer from the pull-down menu.
4. Click on the item column to enter the item sold. Either select an existing item from the drop-down menu or enter a new item name in the space provided.
  - a. If the item is new, select the item type from the "Type" menu located in the "New Item" pop-up window.
  - b. Enter a description of the item in the "Description" window.
  - c. Select the account type that the income from the sale will apply to using the "Account" menu.
  - d. Enter the price of the item and tax code in the appropriate box.

- e. Press the “Save & Close” button to return to the sales receipt window.
5. In the Sales Receipt Window, select the quantity sold.
6. Click on the “Payment Method” arrow to select the payment method used for the sale.
7. Place a check in either the “to be printed” box or the “to be e-mailed” box to select whether to print or email the receipt to the customer.
8. Click on the “Save & Close” button to save the receipt for your records.

## **Implementing Your New Standard Operating Procedures**

After you’ve documented your business systems, you will need to begin implementing them in your daily operations. Before you fully implement them, you will want to take the time to test and measure each documented process to ensure that it works, without your involvement.

Implement the new systems for a period, like a week or a month. Allow your employees to use the documentation that you've created to follow the new processes. At the end of the agreed upon timeframe, speak with your staff, vendors, suppliers, and customers and ask them for their feedback. Use this feedback to revise and improve the systems. You will need to do this on a regular basis to keep all of the processes up-to-date.

## **Get Employee Buy-In**

As you develop and revise your new business systems, involve your employees as much as you can. Your employees are the ones who have been completing the tasks and will be the ones who will be using the newly documented systems moving forward. You can even have the employees develop the initial draft of the processes, leaving you to review and

establish the final versions. This can help to speed up the process and gives your staff ownership of the process.

Developing and documenting processes for your business will allow you to systemize your processes to help free up your time to focus on the more critical tasks related to running your business and keep your business running smoothly when you're out of the office.

# Chapter 5:

## Outsourcing Your Tasks Effectively

Unless you have unlimited funds, chances are you won't be able to hire many full-time employees to handle the various essential functions when you first start your business. As a small online business owner for you to have the same efficiencies as a more massive corporation, you will have to outsource many of the essential functions of your business.

When most people think about outsourcing, they envision a "superstar virtual assistant" who does everything while the owner of the business sits back and relaxes. Unfortunately, this is nowhere near the reality. In reality, no online business can run on autopilot. To be successful, you need to take an active role and be there when it comes to making the crucial decisions.

Outsourcing works best when you have an established framework and documented processes in place that allows anyone to complete the necessary tasks. It's best to hire different people who can handle small aspects of your business, rather than looking for a single person who can do it all. By outsourcing to different people, you gain the following advantages.

- You get the right person because you are hiring for a specific job.
- You save money because you aren't employing full-time employees who get paid even if there is no work to complete.
- You don't encounter a "single point of failure" where your business grinds to a halt if a worker gets sick or quits.
- You won't have to worry if someone is right for the job.

You may think that outsourcing is a huge hassle because you have to deal with multiple people. However, it is a smart business decision, especially when you are a new business owner because each project becomes cost-effective and completed by people who know what they are doing.

Your ultimate strategy in outsourcing is to build a capable team where each member specializes in doing one thing really well. Outsourcing allows you to present a professional image while making sure each of your essential business functions is cost-effective.

Here is a five-step process for locating and hiring a great freelancer. Follow this strategy for every new hire that you make, and you will soon have a team full of talented people who are capable of doing excellent work on every single project.

### **Step One: Identify Your Outsourcing Task**

To be successful, you have to start every project with knowing precisely what you want to accomplish. You will need to know what skills are necessary to complete the task, what outcome you are looking for, and the level of expertise required to be successful. This is the best way to find and hire the right person for a specific job.

Before you write the description of the project, you will need to answer the following questions.

What is the exact goal of the project?

- What problem will it solve?
- Is it an ongoing project or a one-time solution?
- Have you completed the process yourself?
- Can you describe the mistakes that you made during the process?

- Have you hired a freelancer in the past for this kind of project?
- What did you learn from the experience?

Take the time to complete this exercise and be thorough when answering the questions. This step will help you in identifying any potential problems that might arise between you and the freelancer. Plus, it's an excellent way for you to make sure the project description includes every feature and elements that you need for your freelancer to possess.

## **Step Two: Write Your Project Description**

Most of the freelance websites that you will use implement a bidding system for projects. It's your job to write a detailed description of what you want. Once the project description is posted on the sites, people will be able to place a bid for the project by submitting a cost estimation and information about their level of expertise.

Depending on the project that you post, you could receive anywhere from a handful of bids to dozens of proposals. Trying to filter through the proposals you receive can be a daunting task and one that can quickly overwhelm you. Here are some of the ways that you can begin to evaluate the proposals you receive.

- Price
- Feedback rating
- Prior work experience
- Communication skills
- Work samples

Every freelance website is full of talented freelance workers. The trick to getting their attention is to write a compelling project description. It needs to be written in a way that encourages the top-notch freelancers to



respond while subtly discouraging the unqualified freelancers. Including the following seven elements in every job description will ensure that the best freelancers will reply to your post.

### ***Element One: Include a Specific Project Title***

Rather than being cute with your project title, it's better to write a short description of the work that you are looking to have completed. For instance, if you need to hire a writer for a 10,000-word social media marketing report, then you should write: "Need Professional Writer for a 10,000-word social media marketing report." Write the project title, so it focuses on the primary goal. Don't try to gain more attention by writing a catch header. You want people who are interested in this project, not bidding merely because they need the work.

### ***Element Two: List the Required Skills***

It's not enough to just post a job description, especially if you want to find the right freelancer for the project. The best way to go about looking for the right person is to ask for specific experience with the task. In other words, you want to include specific skills that will deter anyone who is a generalist, or those who think they can do an excellent job of bidding on your project. Instead, you want to attract those freelancers who can demonstrate background and expertise in completing the kind of project you are looking to outsource.

For example, let's say you need to hire someone to create press releases. Since these kinds of documents are usually written in a formal, third-person format, you wouldn't want to hire someone who only has experience blogging or creating articles. Instead, you want to find someone who has an extensive background creating excellent press releases.

As part of the description, you want to ask for examples of similar projects. The freelancer should attach these to their bid or provide you with a hyperlink where you can check them out and evaluate their work.

### ***Element Three: Eliminating Certain Candidates***

When it comes to outsourcing, some people are right for the job, and there are those who aren't. To save yourself a ton of time, its best to weed out those who aren't right for the job before they place their bid. The best thing you can do is be clear about what you need from the beginning. This way you won't waste a freelancer's time if you don't think they are a good fit for the job.

For instance, when hiring a writer, you may want to ask for a native English speaker because you want the informal and conversational style that you don't usually get with someone who speaks English as a second language.

Over time you'll start to develop a feel for what you need for your projects. Don't hide your requirements. Instead, post what you need specifically in the initial project description, so you don't end up wasting yours or the freelancer's time.

### ***Element Four: Provide Specific Parameters***

It is essential that the description you write for the project are incredibly detailed regarding what is required. You have to include every possible element so those bidding on your project can provide an accurate bid price.

For instance, you might include the following:

- Specific technical skills required to complete the project
- Any programming languages

- Exact word counts for the project
- The niche market for the product
- Description of the target audience
- Example products and websites
- Links to your current product line
- Elements you like about your competition

Providing detailed descriptions of the project and what you need will help to weed out any lazy freelancers. Detailed job descriptions usually ensure that the people who are bidding on the project are confident in their ability to deliver a quality project.

### ***Element Five: Create a Private Description (Optional)***

Sometimes the job you are outsourcing requires a certain level of privacy because you don't want to reveal too much about your business. For these situations, you'll write a vague description informing the candidate that you'll explain more in a follow-up description for those candidates that are selected. From there, you'll have them sign a non-disclosure agreement before you provide them the rest of the details of the project.

### ***Element Six: Include a Statement About Plagiarism***

Unfortunately, when you are hiring a writer, plagiarism is something that will have to be taken into consideration. Every once in a while, you'll come across a freelancer who thinks it's okay to use the same content from someone else's website. To combat this, you need to include a "zero tolerance" policy within the description of your procedure addressing plagiarism. Inform bidders upfront that you will be checking for plagiarism on every project by running the content through a plagiarism checking site like Copyscape.

## ***Element Seven: Embed a Code Phrase***

Paying attention to details is a skill that can't be taught. Either someone understands how vital it is to read instructions thoroughly, or they don't. For those that don't, you want don't want them to be involved in your business.

A simple way to test someone's attention to detail is to include a "code phrase" somewhere in your job description. Either at the end of the job description or somewhere in the middle of a long paragraph. To see who paid attention to the details of your project description and find freelancers who can follow direction, have them submit their bid with the code phrase at the top.

### **Step Three: Eliminate Unqualified Bids**

Depending on the project, you'll often get dozens of bids, which can be incredibly overwhelming. While it's essential for you to examine each one, it will take too much time to go through each candidate's job history. Here's a simple system that will allow you to eliminate unqualified candidates quickly.

- Eliminate any proposals that look like a template and those that don't answer your questions. Only keep those proposals that provide clear answers to your questions.
- Eliminate any bids that didn't include the code phrase.
- Eliminate any bid that doesn't include examples of similar projects.
- Eliminate candidates that don't have any job history on the site.
- Eliminate any candidates that don't have at least a 4.5 or better feedback threshold.

- Eliminate candidates that don't possess the specific skills that you need.

Surprisingly, you can eliminate many freelancers with these six rules. Notice that cost isn't included on this list. Right now, at this point in the process, it's more important to eliminate freelancers who aren't a good fit for the listed project.

### **Step Four: Pick 3 to 5 Qualified Candidates**

After quickly eliminating unqualified candidates, you'll still have a large pool of freelancers that you will have to sort through. This will require you to go through the list again and disqualify specific candidates. Your goal with this step is to narrow down your choices to 3 to 5 qualified candidates. This step can be hard because the candidate pool is now filled with excellent freelancers. Now is the time for you to carefully look at each bid and decide which is the most qualified candidate for your project.

To narrow down your choices again, look at the following criteria.

#### ***The Bid Price***

This is the step in the process when you have to consider cost. When deciding on a candidate, you'll want to pick a range of bid prices that are acceptable to you and eliminate those candidates who are above this number or who fall below the figure. It is important to remember that you get what you pay for, so you want to be sure to eliminate the low bids because this is usually a good indicator that you will receive poor service.

#### ***Companies v. Individuals***

Pay close attention to the language of the bid. If the proposal includes words like "we" or "us" then it's a good sign that they are representing a company. While you don't have to eliminate companies and agencies

automatically, you need to be careful when analyzing their work history to make sure they are worth the increase in cost.

### ***Personalization***

Many of the bids that you receive will be a "cut-and-paste" response that shows the project description wasn't thoroughly read. While the bidder may have included the code phrase, they do so in a generic response that lacks any personality and connection.

While you are going through the bids, you want to look for freelancers who seem like they are genuinely interested in working on the project. You want to look for freelancers who include comments about how they are uniquely qualified to work on your project and who can relate parts of your description to something they've done in the past.

### ***Project Examples***

Always look at the freelancer's work examples that they provide with their bid. This can be a link to an article they've written, an app, an image, or a website they designed. You will also get freelancers who attach samples of their work history directly to their bid. Carefully examine these examples to see how they stack up to your expectations.

### ***Past Feedback Ratings***

For each remaining bidder, click on their feedback ratings and examine the work they've completed on the freelance website. Even though a freelancer has a high feedback level, doesn't mean that they have experience working on projects similar to yours. Eliminate anyone who doesn't have related work experience.

### ***Timeline***

Even the most experienced freelancers can be a waste of money if they can't complete a project on time. Every bid you receive will give you an

expected timeline for completion. Pay close attention to the delivery dates submitted and eliminate any proposals that go beyond the norm.

These few simple rules will allow you to reduce a large pool of candidates. Be prepared to repeat this specific step a few times to find the right candidates to the short-list. Once you have a few qualified freelancers chosen, you can now move forward with selecting the most qualified candidate to complete your project.

### **Step Five: Pick the Most Qualified Freelancer**

This is where you will make your final decision and hire a qualified freelancer to help you complete your project. Each of the candidates you've selected should be fully qualified to work on your project. Now you have to determine which person is the right fit for the particular task. Here are four things you can do to move forward with making a final decision in selecting a freelancer for the project.

#### ***Create a Small Test***

Timeliness and attention to detail are crucial when running a business. You can test the qualified applicants for these qualities by having them complete a simple test. Give each of the potential hires a small task to finish to see how quickly and accurately they accomplish it. Here are a few ideas you can use.

- Ask them a question about their bid
- Ask them to reaffirm the bid price
- Ask them to sign a Non-Disclosure Agreement
- Ask them to provide you with another sample of their work

The purpose is to give each candidate a simple task that shouldn't take more than a few minutes to complete. Give them a couple of days for them

to respond. If a candidate gives you excuses or takes too long to complete the task, it's a good indicator that you'll get the same kind of service on your project.

### ***Run a Small Project***

If your project is complicated, you may want to consider offering a small fee to each qualified candidate to complete a little project. The best way to determine each candidate's qualifications is to give each one a similar task and see what they come up with. While this step will cost you a small fee, it is a great way to test the actual level of experience of each candidate.

### ***Look for Interest in the Project***

While you are waiting for each candidate to return the small project you assigned them, take some time to look at each of their portfolios to see if they show any interest in the market. It helps to work with someone who is passionate about the kind of project you're offering, although it is by no means a mandatory requirement. The freelancer you choose will work a bit harder and be more eager to do an excellent job on the project if they have some interest in the market.

### ***Check References***

Most of the freelancers that you have short-listed will have references from previous work they've completed. Contact these former clients and talk with them about the freelancer's job performance. Talk to them about the level of quality, communication, timeliness, and attitude toward the project.

Don't be afraid to try and a lot of feedback about a particular freelancer. This person is someone who has the potential of becoming a crucial part of your online business, so it makes sense to try and get as much information on them as possible.



Following these four action items should help you to find the one candidate that is a perfect fit for your project. At this point, you have to rely on your instincts. If one of the freelancers feel like a better fit than the others, then they are the one that you should hire. After making the final decision, you'll create a contract and begin working with the freelancer on completing the required task.

Finding qualified freelance workers to help you work on the documents you've created will help you build a successful business that is fully systemized. Follow these guidelines to help to choose the best candidates for all your business outsourcing needs.

# Chapter 6:

## Automation Tools for Systemization

As a small business owner, you are losing approximately 10 to 15 percent of your time when you don't automate simple tasks like posting to your business's social media accounts. Business automation aims to improve a company's performance by reducing costs, increasing the accuracy of data, and minimizing delays. Most standard small business functions can be handled with software solutions. Once a company automates its primary tasks, they will notice that other aspects of their business will begin to work more efficiently. Here are some of the best automation tools that your business can start to utilize to systemize your business today.

### Zapier

Zapier (<https://zapier.com>) is one of the leaders in task automation. Zapier connects all your apps and allows you to automate your workflows by automatically moving info between your web apps so you can focus on your most important business tasks. You can integrate more than 1,000 apps like Slack, Asana, and Google Docs.

- Features a visual designer that allows you to set up integrations and administer integrations without having to use code. The easy to use visual interface makes setting up your integrations a snap.
- Easily connect almost any application programming interface (API), to another API. Use logical functions and multi-step algorithms for your connects to avoid triggering specific workflows when they aren't needed.

### Flow

Microsoft's Flow (<https://flow.microsoft.com>) turns your company's repetitive tasks into multistep workflows. The automated workflows that you create between your favorite apps and services will send you notifications, automatically synchronize files, collect data, and much more.

- Create, use, and share automated approval workflows to respond quickly and process and approve everything from time off requests to travel plans to sales opportunities and documents.
- Connect securely to your cloud base services and on-premises data so you can make the most of the data you already have.

## **Pipedrive**

A CRM and pipeline management tool, Pipedrive (<https://pipedrive.com>) helps you focus on actions that matter. The visual sales pipeline prompts you to remain organized, take action, and stay in control of your complicated sales process by bringing all the sales data into a single place.

- The mobile app gives you access to your contact and deal information when you're on the go. Schedule activities, take notes during a call or meeting, save call logging activities easily when you're away from the office.
- Use Pipedrive's reporting feature to understand where you're losing deals, forecast results, and identify opportunities for improvement.

## **TextExpander**

TextExpander (<https://textexpander.com>) lets you instantly insert snippets of text from a collection of emails, boilerplate, and other content, as you type. Using the quick search feature or an abbreviation you can recall your best words instantly.

- You can share your snippets with your team so that they can stay on track and on message. Access all your snippets from any device with a TextExpander account so you can give your entire support team the current answers to all your customer inquiries.
- You can also streamline your email and use the fill-in-the-blank feature to create custom forms with multiple filed types and sectors.

## Alfred

Alfred (<https://alfredapp.com>) is an award-winning app for Mac OS X. It's a workflow automation tool and a hotkey tool that allows you to navigate your interface with your keyboard rapidly. You can create and automate complex workflows that you trigger from a hotkey.

- Launch applications and find files on your Mac and the web. Alfred learns how you use your Mac and prioritizes the results, saving you countless hours.
- Alfred's Powerpack feature uses powerful workflows to perform tasks more efficiently, allowing you to cut down on the repetitive manual tasks that eat up your valuable time.

## IFTTT

IFTT (<https://ifttt.com>) stands for If This Then That and is the free way to get all your apps and devices talking to each other. With IFTT you can bring the Internet of Things (IoT) into your pocket with mobile-based automation tools.

- Use widgets to run specific Applets with the simple touch of a button on your iOS or Android devices.

- Automate tasks between a wide array of apps, services, and devices. Their web and mobile app are easy to use and support IoT devices and voice assistants like Google Assist and Amazon Alexa.

## **Shortcut**

Shortcut (<https://shortcutapp.com>) allows you to navigate your screen with your keyboard, effectively rendering your mouse useless. It helps you to boost productivity by removing the need to take your fingers off the keyboard.

- It leverages the Accessibility API, which is supported by all applications that are included with Mac OS X and many other applications.
- The program lets you keep your hands on the keyboard to click, which saves you both time and energy.

## **Robotask**

Robotask (<https://robotask.com>) is a powerful tool for PC users who are committed to automating their workflow. The program allows you to automate repetitive tasks on your PC that range from launching applications to checking email.

- With Robotask you won't have to create batch files or write complicated scripts to develop simple or complex automation tasks. It uses its visual interface to allow you to select and combine actions to fit your needs.
- Create automated tasks and automatically execute them when certain conditions apply.

## **Tallyfy**

Eliminate the chaos from your business processes with Tallyfy (<https://tallyfy.com>). This workflow software turns your daily tasks and approvals into automated, repeatable processes. It eliminates the pain of emails, calls, papers, forms, and spreadsheets.

- You can easily map existing flowcharts or SOPs into Tallyfy templates and simplify your work into actionable steps that reflect real-life workflows.
- Its open API allows you to connect to most of your existing tools.

## **Intercom**

Catch, convert, and keep more customers with Intercom (<https://intercom.com>). Intercom is a customer messenger platform that allows your customers to get in touch with you straight from the web. It's perfect for sales, marketing, and support.

- Use bots and live chat to automatically qualify, route, and convert more leads in less time.
- Send targeted emails and push and in-app messages to quickly onboard and engage customers, turning more signups into paying customers.

## **Delivra**

Delivra (<https://delivra.com>) is a results-driven email marketing automation platform that makes it extremely easy to engage your audience and increase revenue.

- With its marketing automation, you can deploy smarter email campaigns that are more efficient and customized for your audience.

You can create triggered responses, easily segment subscribers, send emails based on consumer behavior and create dynamic content.

- With weekly reports delivered directly to your inbox, you can keep track of the progress and performance of each email campaign. The weekly insights will provide you with subject line analysis, the top-performing content, and the number of social shares by channel.

## **Autopilot**

Spark new customer relationships and rekindle old ones with the simple and straightforward Autopilot (<https://autopilothq.com>) program.

Engage with your customers at the right time with personalized emails, SMS, in-app messages, and postcards.

- Use the program to connect to your apps and automate tasks to capture a richer view of all your contacts and engage with them based on their behavior.
- Easily track your performance to get insights into which messages convert, how your messages are trending, and what is driving sales. Quickly visualize your revenue funnel and optimize your process on the fly with real-time results.

## **mHelpDesk**

mHelpDesk (<https://mhelpdesk.com>) automates your customer contact, scheduling, billing, communications, and everything in between. The program was designed to supercharge your repetitive, manual business processes so you can focus on what really matters.

- Track every stage of the job with complete visibility of your workflows. You'll be able to see the progress of every job in real-time. See every change in a job that has occurred using the Activity

Log feature and holds your team members accountable for their actions.

- Save yourself time and money and speed up your cash flow. In less than 60 seconds you can start accepting Visa, MasterCard, American Express, and Discover with the easy to set up payment processing system.

As you start to put stable systems in place in your online business, consider adding one or more of these powerful and easy to use automation tools. Automating the repetitive and repeatable business tasks will free up your time so you can focus your time and energy on the essential functions required to grow your business.



## Chapter 7:

# Scale-Up Your Business to the Next Level

Now that your online business is structured correctly, and you have the right people in place to handle the essential functions, the time has come for you to begin scaling your business. Having a well-structured operation in place will provide you with the luxury of using your own skills to grow the business in whatever area where you're an expert.

This is where most people try to start their online business. The general thought is that if you are an expert in a given area, that will be enough for you to start and run a successful business. However, talent in one area is simply not enough.

You, unlike so many other small business owners, have a distinct advantage. Unlike other online business owners, who quickly find themselves in over their heads and scrambling to try and master a dozen different tasks at once, you have a reliable system in place that has freed you up from having to deal with every little task personally. Instead, you can concentrate your efforts on utilizing your specific talents to grow your business.

Scaling your business might seem overwhelming at first when you're already swamped with work and home life. While it can be challenging to find the time to focus on scaling your business correctly, the following information can help you tackle the process without breaking a sweat. A good part of scaling a business merely involves getting your ducks in a row before you start ramping up business.

### **Create the Right Strategic Plan**

Your strategic plan is the road map that directs your company's focus to the fewer and better things that will allow you to dominate your market niche and create explosive growth. It prompts you to look at the big picture. It also helps you to prioritize and allocate your company's resources to their best advantage. Finally, it helps align your team on the big picture, so they can better manage their responsibilities and contribute more to the needs of the company.

When it comes to creating your strategic plan, you have to ask yourself the following three questions:

- Why is your company in business? This first question cuts to the heart of why you're in business in the first place.
- What is your singular goal? You need to think about the one goal that you are mobilizing all your company resources to accomplish over the next three to five years.
- What's in it for you and your team?

Creating a strategic plan isn't a one-time activity, but one that will continually evolve as you learn, refine, and re-create your business. Every quarter, you need to revisit your plan and map out the next 90 days. You'll want to determine your top three strategic priorities for the coming quarter and write up a simple one-page plan of action that specifies exactly what you must do that quarter to grow and develop your business.

The reason why this process works so well is that it forces you to take a fresh look at your business every three months while also allowing your team to dive deep into the execution of actually accomplishing meaningful progress on the areas of the most importance in your business.

Done well, these 90-day sprints will reward your business with the most significant benefits of regular opportunities to change and adapt to the market demands.

### **Measure Effectiveness with Accounting**

Sound systems have a way of increasing efficiency throughout your business, allowing you and your employees to accomplish objectives and give your customers what they want every single time. Your business accounting should be the master system of your business that can measure the effectiveness of all your business processes. Your accounting system is the brain of your business, processing all of the data related to the activities of your business and providing you with strategic information that will allow you to drive growth and profitability.

In many small businesses, accounting is seen merely as the system that is used to pay the bills, reconcile the bank, invoice customers, and prepare tax returns. What many small business owners don't realize is that it is the perfect system for gathering business intelligence.

Your accounting information will reveal the strengths and weakness of your business. It can tell you what went wrong in the past and what can be done to improve in the future. The accounting systems you use in your business can reduce large quantities of complex data into understandable and straightforward information that contains the seeds of solutions for all the problems your company may be facing. It is also the basis for making critical business decisions.

To develop the perfect business requires discipline and a systematic course of action. You must understand where you are at, where you are going, and how you are going to get there. To do this, you must use strategic information and systems to achieve financial control. When managed correctly and grown correctly, your business can become

profitable and reward stakeholders while creating economic and personal freedom for you.

Every business has one or two "key numbers" that drive its economic engine. If you want to be able to scale your business, you have to have knowledge of and control over these numbers. When this happens, everything else will fall into place. If you haven't already identified these numbers, you need to do so now. Paying attention to these critical numbers will make all the difference in your ability to scale and grow into a successful business.

### **Focus on Sales and Marketing**

Every company has to generate leads. If you don't have any leads, then you won't make any sales. If you can't make any sales, then you won't have a business. It's that simple. If you want to sustainably scale your business, you have to evolve from growth based on your personal production to growth based on the stable base of system, teams, and controls you've established.

Sales are everything you do as a business to make your offers as useful as possible and to close selling opportunities. Your offers can be delivered in a variety of ways, from call centers taking phone calls to trained sales reps, to sales letters to an interactive website and everything in between. It is your sales and marketing efforts that will find your clients, generate sales, and increase revenue.

Too many small business owners focus solely on sales and marketing because they feel they have to as opposed to wanting to. They feel intimidated by the idea of selling, but to be successful, they must focus a majority of their energy on generating profitable sales. If you don't, your business will never thrive, let alone survive.

When you first start your venture as a small business owner, you focus your time and energy making sure that sales happen, which usually means meeting with clients and closing the deals yourself. As you begin to look at scaling your business, you have to focus your attention on creating repeatable and scalable selling systems that don't depend on your involvement to function. This might involve building advertising systems that will generate leads, hiring and training new sales reps to close deals, or eventually hiring a sales and marketing manager to take over.

To build a sales and marketing department that can function without you, the following systems need to be included in your growth strategy.

- Lead generation systems that can consistently generate the lead volume that is needed to make sales.
- Lead conversion systems to consistently convert leads into paying clients.
- Tracking and reporting systems to measure the effectiveness of your marketing and sales efforts. This will allow you to optimize your selling system over time.

Tacking your results is an essential part of scaling your business. You can do this by creating simple spreadsheets that tell you what is and is not working. After you've gathered the numerical data, you can determine the best lead generators, the best lead converters, and the best current client resellers and invest in scaling up those efforts.

The first step to removing obstacles to scaling your sales and marketing efforts is to pinpoint your company's most costly lead-generation weaknesses. The following checklist can help you evaluate your company's lead-generation challenges.

- You don't have enough leads to sell to, or your lead generation is erratic, and you don't have a consistent lead stream you can't count on.
- You don't have a system to organize and maintain your leads.
- You don't have a structured lead scoring system.
- You don't systematically track your lead-generating efforts.
- You don't have a system to generate leads.
- Your current lead-generation processes aren't scalable.
- Your current cost per lead is too high.
- Your lead quality is too weak.
- You have a ton of lead-generation ideas, but you just aren't able to effectively implement them.
- Your marketing is too reliant on you.

Check the box for any of the challenges that are currently hurting your business. If you check more than three boxes, go back through the list and circle the one pain point that hurts your business the most. This is where you will need to focus initially.

### **Five Steps to Build a Baseline Lead-Generation System**

It's not enough for you to just learn new tactics to generate leads and close sales.

You need to build the systems that help you to accomplish these tasks.

The problem with having informal systems in your business is that they leave your business vulnerable. If you get sick or busy, there is no one else who knows how to do the fundamental processes that you have stored in your head. Informal systems that are locked in the minds of you and your

key employees aren't scalable. Here are five steps to take to build out your baseline lead-generation system so you can scale your business.

### ***Step One: Determine the Marketing Tactics to Focus on First***

Look at all the lead-generation tactics that you've used and picked your single most important one. This will be the tactic that you will systemize first. If you're not sure which one is the most important, ask yourself if you could only do one thing to generate new leads, what would it be?

### ***Step Two: Draft the Process Layer of How to Implement the Tactic***

Using sticky notes, write down the steps that you will need to follow to implement this marketing tactic. Each sticky note should contain a single step. This is an effective way to document your process because it frees up your mind to lay out the steps and edit them as you go. Once you have the process of executing the marketing tactic, write it up into a simple step-by-step recipe.

### ***Step Three: Create a Round Scorecard to Track the Tactic***

The key to this step is to gather relevant, objective data that will tell you how well your marketing efforts are going. You need to be able to compare tactics to make smart, strategic decisions about where to invest your time and money.

### ***Step Four: Package the Process***

You need to determine the best way to package the process that will ensure your team and business follow the steps consistently to get the results you want. You need to ask yourself, what the best format is to package the critical stages of the system so that it is followed consistently.

### ***Step Five: Implement, Track, and Refine***

When you pay close attention and track the results from your lead-generating efforts, you'll start to spot opportunities to improve your system. You and your team will continuously find ways to tweak and improve your baseline lead-generation system so that you can continue to produce more and better-quality leads.

## **Implementing Marketing Controls**

When it comes to your marketing efforts, there are four essential controls that you need to have in place to make sure that the right steps are being taken, at the right time, to get the correct results. To make sure your marketing systems continue to operate smoothly to produce quality leads for your company.

### ***Marketing Calendar***

The first step to ensuring that the sales and marketing systems you've put in place operate smoothly is to develop a marketing calendar. Take the time to lay out your essential lead-generation campaigns for the next 90 days on a standard calendar. Next, add the deadlines for any key steps that are required for you to run that campaign successfully.

A marketing calendar is an excellent visual control to make sure that you remain on track with the precampaign steps required to make your lead-generation efforts successful.

### ***Standardized Marketing Collateral***

Whether you develop a template email that is sent to everyone who registers on your website, a glossy white sales brochure your sales reps use, or a white paper that prospects can download from your site, having standardized marketing collateral is an effective control to make sure your prospects are getting your best sales message.



Your marketing collateral will not only help your prospects learn about your products or services, but they can be used to train new employees on the product knowledge they will need to have to be a productive member of your team. Start small and build out your marketing collateral in bite-sized chunks.

### ***Develop a Marketing Scoreboard***

Create a simple scoreboard that gives you the high-level of results of your marketing efforts. Start by using the following three numbers.

- Your Cost per Lead – measure the total cost of a particular marketing campaign and divide it by the total number of leads that were generated during a specific period. Knowing your cost per lead helps you compare which lead tactics are the most cost-effective.
- Your Cost per Sale – measure the total cost of a particular marketing tactic and divide it by the total number of sales you made from that tactic.
- The Return on Investment – a powerful way to equalize various marketing tactics so you can see which one has the most significant return on investment. Calculate it by dividing the total sales you made with that tactic by the total amount you spent on the tactic.

### ***Implement a Customer Relationship Management System (CRM)***

Your CRM is the system you use to organize your customer and prospect data and how you manage those relationships over time. When used correctly your CRM can help your business ensure that leads are appropriately captured and followed up with on a timely and effective basis.

## Hire the Right People

To grow your business, you're going to need talented members of your team to both spark and support growth. Whether you are adding new members to your sales team to increase sales or engineers to design new products, your company's most significant source of leverage is its ability to attract, hire, integrate, and empower talented employees.

One of the only ways for your company to create and sustain rapid growth is for you to systematically make your business a place where great talent wants to work. Here are some simple ways in which you can do that.

- Deliberately define and profile your ideal employee. Take the time to establish a profile of your business's perfect employee. While the specific qualifications will vary between positions, you can think of several common traits, beliefs, and drives that you want your employees to encompass. Think about how you can build simple filters in your hiring process to weed out any candidates that don't fit into your profile.
- Be selective about whom you invite on your team. Great talent tends to thrive when working with other talented individuals. Keep your standards high as you hire and consider upgrading weak team members as you have the opportunity and cash flow to do so.
- See the whole person and manage individually. While your company has to have standard HR policies in place, you can still use your common sense in applying those standards. The goal isn't to treat all your employees the same, but to produce amazing results by getting your team to perform at its best.

- Remove poor performers quickly. If you have poor performers on your team, it is essential that you provide them with proper guidance, coaching, and training. However, if after a time it becomes clear that they can't perform at the level of those around them, then you have to remove them swiftly and decisively.

Now that you've found the right talent you can begin to enlist them in developing ideas to scale and improve your company. Every six months, ask each of your team members to go through the company, department by department and write there three best ideas for scaling and improving your business.

Once they've completed, the tasks spend some time going over the results. Choice the top suggestions and hold a team meeting to go over the results and allow them to help you pick out several of the best ideas to implement in the company immediately.

Repeat this process over time and watch how your company benefits and improves with the ideas, as well as how your team responds and grows when they see you take their input and ideas seriously.

# **Conclusion: The Final Words**

When it comes to running a successful company, it is important to remember that your business, as well as the markets you serve, are not static, but are in a constant state of flux. This means that over time you'll need to refine and redesign your systems and controls. The more you grow, the more that growth will require you to evolve your systems.

Rapid growth will continue to make increasing demands on your outdated systems. The systems that worked for a \$500,000-a-year business will no longer be sufficient to cope with a \$5 million company. This is why you need to approach your systems and controls as a work in progress as you continue to scale your business.

As you grow your business, your policies and controls must grow with you if you want to run a successful business.