BUsiness Management Bootcamp

Module 2: Partnering with Systems That Work for You

Now that you've nailed down the foundation of your business, let's talk about the systems you're going to use.

Remember that you can handle any aspect of your business systems using any one of three different types of solutions: Automation, outsourcing and doing it yourself.

We've determined that you should automate or outsource any system that does not directly benefit from your personal involvement; that you'll make more money and build your reputation more quickly in the public eye if you focus only on the skills, talents and results you want to be known for.

The systems you choose will depend on your budget and the tasks and functions your business dictates. **Make a list** of every task and function that will be part of your business—what you need right now, as well as for the future. As you check out specific automation systems or outsourcing candidates and their unique mixes of skills, you'll be able to choose:

out specific automation systems or outsourcing candidates and their unique mixes of skills, you'll be able to choose:

- o Systems that integrate as many of these individual tasks and functions as possible

- o Contractors with the most useful combinations of skill sets

For example, if you want an assistant who can not only handle your email list and autoresponder, but also provide customer service, you might prefer to hire a Virtual Assistant who specializes in both these areas, rather than hiring two different assistants.

And if email autoresponder "A" that you are checking out includes compatibility with your Infusionsoft shopping cart, whereas autoresponder "B" doesn't, you might be more inclined to choose "A".

When choosing a particular system for your business, don't just look at features and integration, however: Also consider…

- o Compatibility with your other systems

- o Present needs

- o Future needs

- o Who is going to be using it (you or a contractor-specialist or assistant)

All these factors will affect your final system choices and the efficiency of your business.

STEP ONE: BUILDING YOUR EMAIL LIST

One of the first systems to set in place is how you will handle your email list. Invest in a professional-quality autoresponder system and start attracting subscribers right away. You may have heard the expression "the money is in the list". It is as true today as it was when the autoresponders first started.

When you have subscribers, you eliminate major hurdles in making sales. Subscribers are people already committed to you, who have already parted with their contact information and who are interested in what you are offering. It is far easier to make frequent or recurring sales to existing subscribers than to go out and build a new bridge from scratch, every time someone wants to cross; then convince each stranger to walk over it. Those who use your bridge all the time will not only unhesitatingly say "yes", they will also often enthusiastically recommend you to others who need you.

Even if all you have to offer is "news of my next blog post", get that list started. And enable the sign up tab on your Facebook Page, as well as creating a sign-up web form with call-to-action for your site.

When choosing an autoresponder, ask yourself (and answer) the following questions—keeping in mind future as well as current needs:

- o Will you need mass emails to go out?

- o Will you need advanced features, like list segmentation, tagging, or separate affiliate for your sales?

- o What is your current budget for an email system?

- o Who is going to be handling your list? If it is a contractor, have you chosen one who is experienced with your autoresponder of choice?

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- o Do you need your autoresponder to start out 'small', but grow with you as you add subscribers, or would you prefer to start with unlimited subscribers now?

There are many different companies to choose from, so be sure to check out their different pros and cons, and choose the autoresponder that best suits your specific needs —and budget.

Here are the top three autoresponder companies to check out:

- o [Aweber](#)
  - o [MailChimp](#)
  - o [ConstantContact](#)

Other popular choices include [ConvertKit](#) and [GetResponse](#).

And if you are planning to use a full automated marketing service like [LeadPages®](#), [Infusionsoft](#), [ClickFunnels](#) or [Ontraport](#), be aware that these include many other systems such as autoresponders, shopping carts and landing pages as well.

Most autoresponders offer free trials, but try to select your best-choice system first, so that you don't have to undo work or start all over from scratch, if you don't like one you're trying out.

Also, be sure to **choose an autoresponder that allows you to migrate (export) your list**, so that you don't have to ask people to sign up all over again if you switch to a different autoresponder further down the line. (That's a sure-fire way to lose subscribers!)

Read the testimonials. See how the results look and work on the websites of people who gave these testimonials. And if you want to take our research one step further, ask your peers what autoresponder system they use, and what they like (or don't like about it).

You don't need to spend weeks (or even days) checking out these systems—but do your best to choose ones that really fit well with your business, now and for the future.

STEP TWO: YOUR WEBSITE

Have you chosen a content management system for your website? Meaning, do you want it written in straight programming code (XHTML and CSS)? Will it be a blog? Do you want to host it on a done-for-you system like WIX or Weebly (perhaps one provided by your web host? And who will your web host be?

When choosing a web host, as always, needs, future expansion and budget are your three main considerations—along with reputation and reliability. You need to choose a web host who has a minimum of "down" time. In general, it's best to avoid web hosting services that are super-cheap, especially if their primary business is domain registration. These websites often act as 'token' sites to appease domain registration customers and possess minimal features. The worst ones sometimes place their own ads (which might conflict with yours and make money off your hard work) in your websites—or are loaded with spyware.

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The most popular current option (and it has been the most popular for several years) is to run your website either as a static-front-page website or a blog, using [WordPress](#) as a user-friendly, WYSIWYG content management system.

Most reputable web hosting companies will allow you to auto-install WordPress with one click from within your website Control Panel—you don't have to download it at all.

If you really do just want to have an easy-to-create, simple, minimal-page website and you don't mind a limited choice of templates, using a website-host-plus-builder such as [WIX](#), [Squarespace](#) or [Weebly](#) can often be sufficient… but be aware that your branding choices may be limited, and you may have to switch to a more robust system later on.
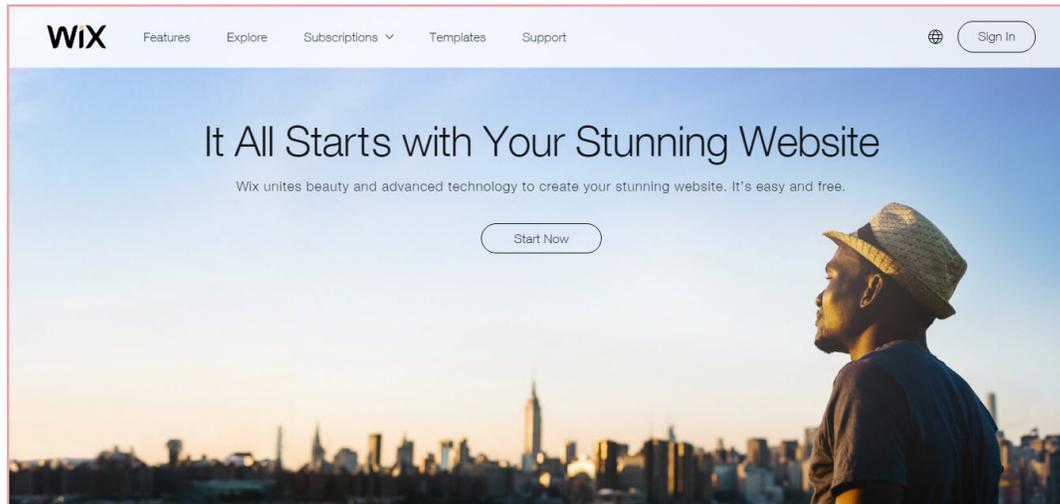
If you're decidedly non-techie and you don't want to deal with a web designer, a wonderful compromise is to host your site at [ReliableWebs](#). For $12.95 (their Multi Plan), you can install WordPress, add unlimited websites (add-on domains) and enjoy fast, superb-quality, personalized customer service. They have been in business since 2000 and they are a rock-solid company.

They will even set up your blog for you (or set up add-on domains) for free; and if you already have a blog on another web server, they'll move that blog to their servers at no charge too.

Other popular and budget-friendly choices include [Bluehost](#) and [Hostpapa](#).

If you can afford to go high-end, full service and or you need a **dedicated, VPS server**, Melissa Ingold of TimeFreedomBusiness recommends [LiquidWeb](#).

With all web hosting companies, make sure you carefully check to see how much bandwidth is allowed on the plan you are interested in. Check also to see if you can upgrade your plan as your business grows. You do not want to invest in a plan so small that your servers will crash, the first time you get a rush of sales on your website!

Whatever solution you choose, remember that it is best to own your own separate domain name and host your own website on a web hosting service and maintain full control. With all other shortcut or integrated solutions, if they suddenly fold or decide to drop you, for whatever reason, your website is gone in a flash.

You will need to **register your domain name**. This can often be done through your web hosting company at the same time as you sign up for web hosting, but if you want to register multiple domains, use a separate domain registration company such as [Dynadot](#) or [GoDaddy](#).

Finally, do make sure you set **regular back-ups** for your site, in case it is hacked or "broken". The quick, free-to-low budget option involves installing a WordPress plugin (if

Finally, do make sure you set **regular back-ups** for your site, in case it is hacked or "broken". The quick, free-to-low budget option involves installing a WordPress plugin (if you have a WordPress-based site) like BackupBuddy: Or you can back up any type of site —HTML or WordPress—with Carbonite.

STEP THREE: PROJECT MANAGEMENT AND ORGANIZATION

If you already know your company is going to consist of just you and maybe an assistant or two, you can keep project management and organization simple and share files across a free or paid Dropbox cloud storage account. (You can also back up your files there too, simply by saving them in a Dropbox folder.)

If you know you are going to have multiple contractors, however, and outsource most of your business, you will want a more robust project management system—and perhaps even hire a project manager to coordinate all these contractors. Here are three that tick many boxes:

o Asana
o Trello
o Basecamp
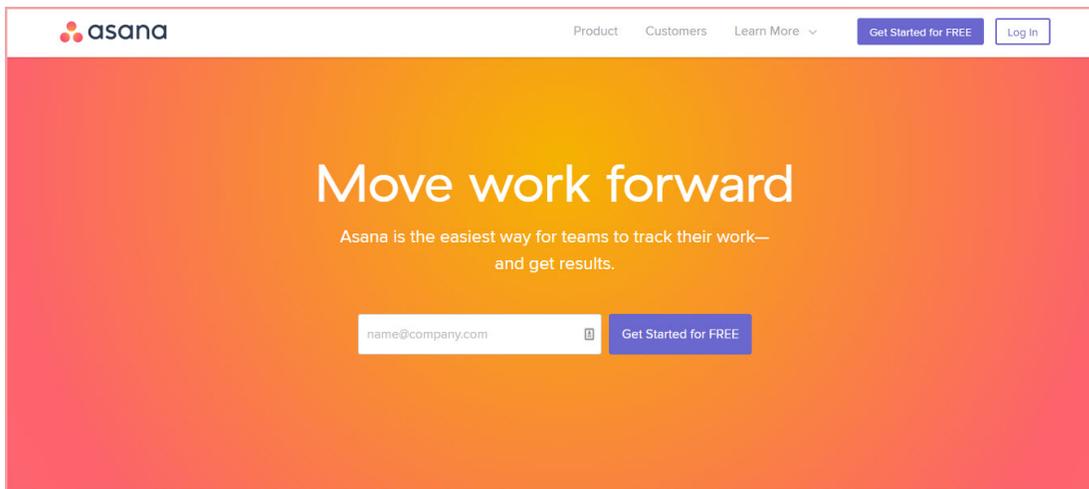
Remember that most project management companies offer free trials, so you can test them out and see what system is right for you (and your budget).

STEP FOUR: SCHEDULING SYSTEMS

If you are a coach, you already know that it can be time-consuming and sometimes less than cost-effective to manually schedule clients. You need to remember to send email reminders, confirmations, and deal with schedule moves and cancellations. This doesn't sound too hard, but it can disrupt your day, cut into your money-making activities and leave room for client-displeasing errors or confusion.

Using an automated scheduling system that allows people to schedule themselves in the available slots you've designated, and which will also send confirmations or allow them to reschedule (and even notify you of changes or cancellations) can be a real life-saver for coaches. So, do check them out.
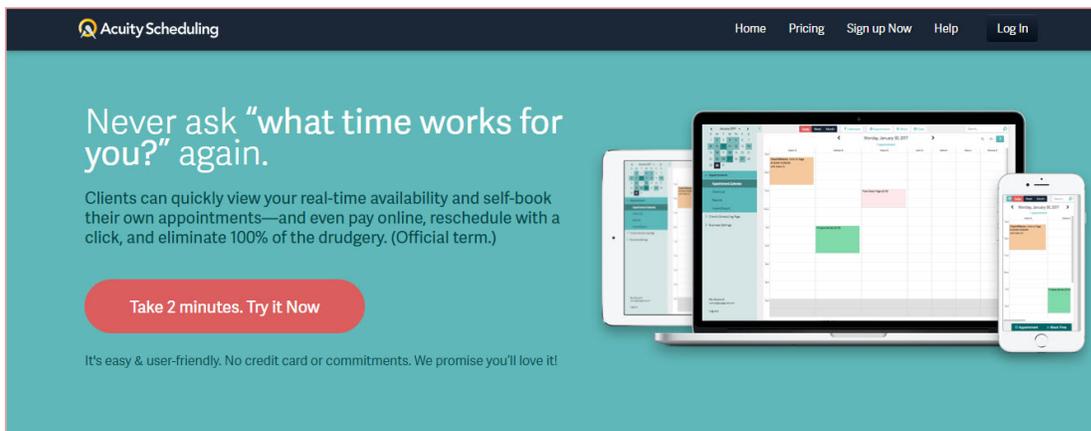
If you choose one, first make sure that you have a calendar that synchronizes with your phone.

Here are three popular and effective options:

o AcuityScheduling
o Calendly

- Calendly

  - YouCanBookMe

Make sure that you set it up to sync with your Google Calendar, or iCal on your phone. So, that as you update your calendar, it also updates your availability automatically.

STEP FIVE: INVOICING AND PAYMENTS

Make the most of every opportunity to say "yes" to clients by making sure you set up a professional invoicing and payment system that allows your client to pay either by PayPal or by credit card.

Top payment apps and systems used by coaches include Stripe and Square. Coaches often use Satori App, an all-in-one, easy solution with many features like contract signing, managing your clients, scheduling your clients, and offering payment service to your clients.

17hats is also a platform that offers tasks, to-do lists, contacts, automated workflows, invoicing, email support that will synchronize with your email, and many other features.

Decide on features you want, and factor in these needs, when choosing apps for tasks like scheduling, invoicing and payment collection.

If you need a shopping carts on your website, you can either use Infusionsoft—it may be too expensive and complex for those with simple business models, or who are not yet making a healthy income—or another shopping cart system. Whichever one you choose, make sure it integrates with PayPal buttons, such as 1ShoppingCart or WooCommerce.

STEP SIX: BUT WHICH ONE DO I CHOOSE?

Another good alternative: Simplify your life by using an all-in-one, coaching business-in-a-box that combines many necessary functions, tools and systems into one easy-to-manage dashboard.

Two of the best:

  - Jigsawbox

- The Coaches Console®

Both are complete coaching business systems created by coaches for coaches. And both offer strong and friendly support, as well as many features and resources.

There are lots of other systems, apps and software you may find yourself needing as a coach.

Here's a quick list of ones you are most likely to need.

Webinar software	InstantTeleseminar	GoToWebinar	Zoom
Stock image sites	Pixabay	BigStockPhoto	iStock
Easy Graphics Tools	Canva	PicMonkey	Easel.ly
Graphics Editors	Affinity Designer	Adobe Creative Cloud	Gimp
eSigning	DocuSign	EchoSign	HelloSign
Social Media Mgmt.	MeetEdgar	PostPlanner	Hootsuite

Right now, if most of these online systems and tools are new to you, you're probably feeling pretty overwhelmed! Don't panic—and whatever you do, don't grit your teeth and check every single link out without having a plan and strategy in place for your systems first.

Use the Action Plan and Exercises accompanying this module to do a quick determination of which tool or systems you'll need: Then be sure to **enlist experienced aid in setting up your systems**.

The best plan: **Talk to your own coach and discuss your best systems strategy** with her. She has been there and done what you're about to do, and this is probably your most time-saving and effective approach.

STEP SEVEN: PASSWORD SECURITY

Once your business becomes successful or even noticeable, one area you absolutely can't neglect is security. Successful sites are prone to hacking attacks—some of them devastating, wiping out years of work.

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You're going to reduce your vulnerability greatly by investing in two must-have security measures. One we've already discussed—making sure you have a system for regular site backups.

The second is to use a central and secure Password Manager, like LastPass or RoboForm.

The way this works: You need to only ever remember one Master Password (and write it down offline, in a secure and easily accessible spot, because you can't retrieve it if you lose it). LastPass itself (or Roboform, if you prefer) will "remember" all your myriads of passwords behind a secure "door", giving you instant access to all your sites—without having to remember individual passwords.

Plus, you can use your password manager on your other devices (like iPads and smartphones) too.
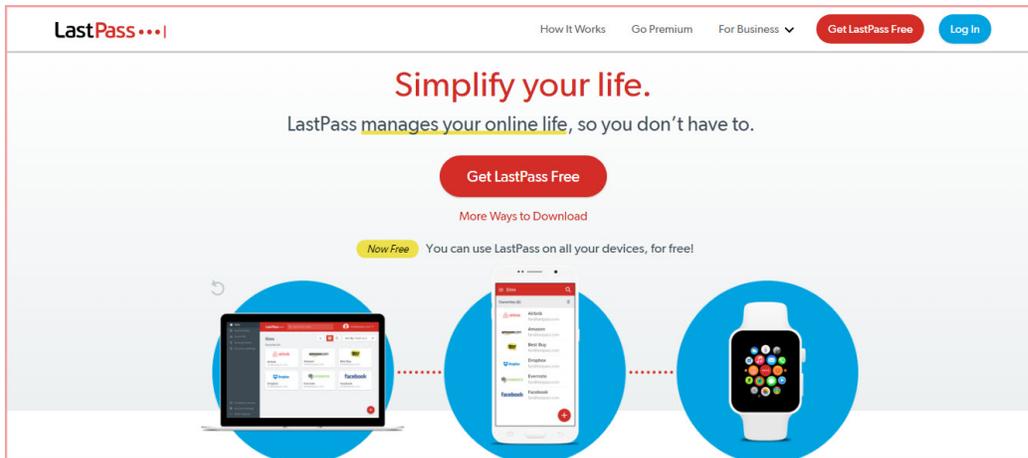
(And if you've ever spent twenty minutes trying to find one teeny password for one specific subscription, and given up and gone through the hassle of changing your password, then contacting customer support for that particular site because your new password doesn't work, you'll particularly appreciate having a Password Manager!)

Whatever systems you choose, however, remember that they are there to serve you. Try to choose the best ones you can; then take advantage of the free trials—and don't put off working with them until the trial is over. Make time for your systems and choose the solutions that can grow with your business.

In Module Four, we'll discuss another potent solution to eliminating system learning curves and headaches—effective outsourcing. But first, let's move on to Module Three, which will show you the essentials of money management for simplicity and growth.

1