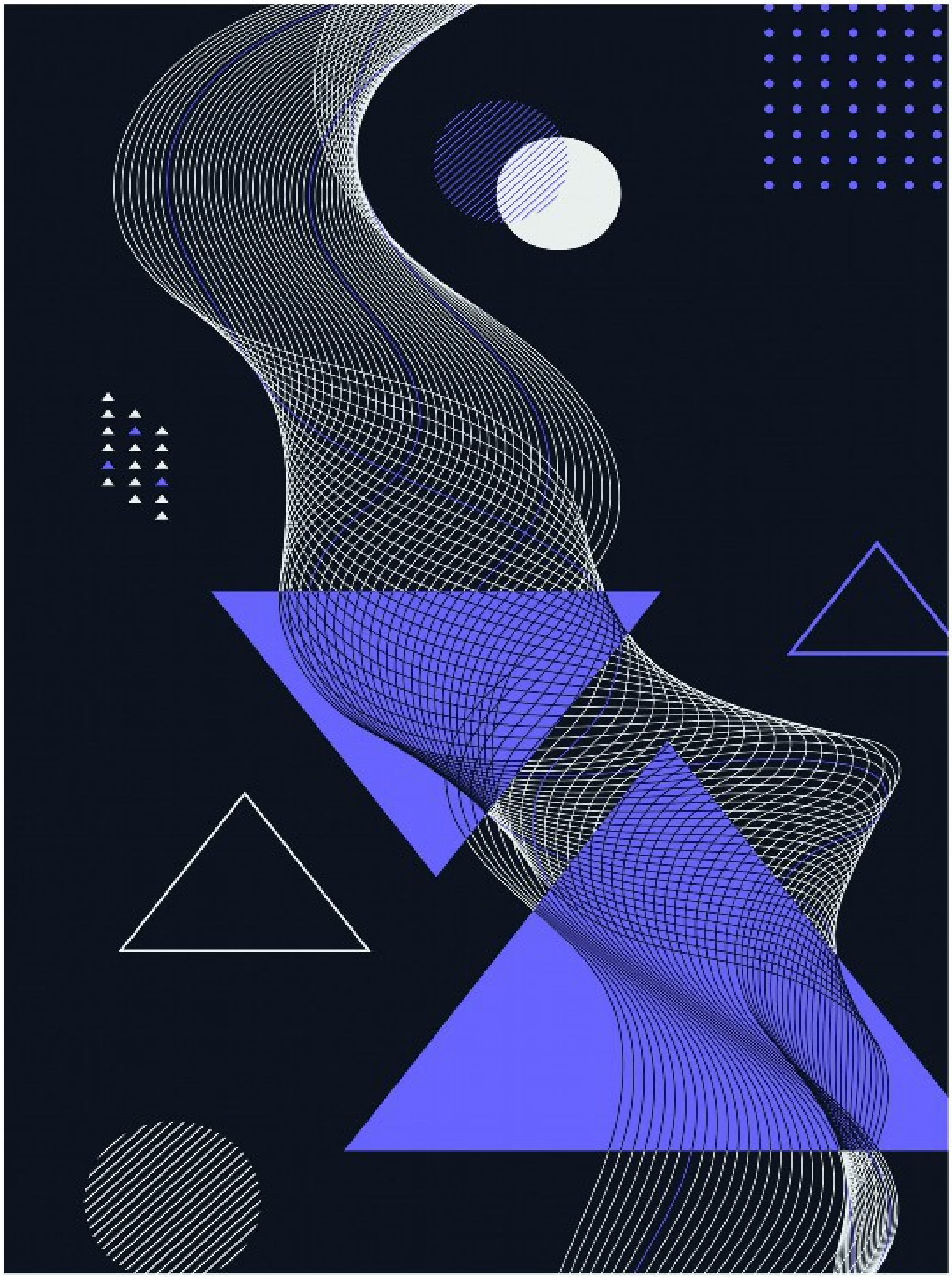
BUSINESS
SYSTEMIZATION

COMPLETE GUIDE | Base Logic AI



COMPLETE GUIDE

BASE LOGIC

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CHAPTER 1

INTRODUCTION: THE BENEFITS OF SYSTEMIZING YOUR BUSINESS

The internet has transformed the way people view entrepreneurship, especially in the realm of small businesses. Millions have attempted to launch online ventures, and many have succeeded. Among the most common reasons for failure, however, is the inability to properly systemise operations and make the best use of available resources.

Successful online business owners recognise that having a great idea is just the start. They understand the importance of cultivating a customer base and managing the daily functions that all businesses—online or brick-and-mortar—require. Whether through self-learning or outsourcing, these business owners ensure the necessary tasks are handled efficiently.

Systemising your online business is about marrying your vision with practical execution. While it may sound technical or overwhelming, the reality is far simpler. Anyone can learn to effectively systemise their business and set themselves up to run a consistently profitable enterprise.

What is Systemisation

For many, the term "systemisation" conjures images of endless meetings and bureaucratic processes that complicate rather than streamline. This misconception leads to the belief that systemising a business is about creating unnecessary procedures that bog everything down. In truth, the opposite is true.
A systemised business isn't ruled by red tape—it's empowered by clarity and purpose. It isn't about busywork or micromanagement; it's about developing straightforward, reliable processes that help the business run smoothly.
When systemised effectively, your business can operate more independently, allowing you to focus on higher-level priorities like marketing, product development, or strategic planning. Staff members know what to do, how to do it, and when it's needed—without relying on constant oversight.
Though not every task will be thrilling, systemisation ensures they are manageable and efficient. You'll gain more freedom, while inefficiencies and disorganisation are minimised. A lack of systemisation leads to duplicated efforts, delays, and burnout—issues that can ultimately hinder your success.

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

As the owner, your time is best spent developing new products or exploring strategic growth—not sorting through emails or routine admin. Without documented systems, it's difficult to delegate daily responsibilities. By recording your processes, you enable others to take over tasks with confidence, freeing you up to focus on higher-value work that drives revenue.

Increase Efficiency

By documenting procedures, you not only clarify them for others but also identify redundant steps. This gives you the opportunity to refine the way tasks are performed, reducing errors and saving time. Over time, this leads to a more streamlined operation that supports business growth.

Improve Performance

Without standardised processes, different team members may perform the same task in various ways—some more effective than others. By identifying and documenting the most efficient method, you boost consistency and performance across your business. Staff can work with greater confidence and fewer mistakes.

Improve Communication

Miscommunication is one of the biggest productivity killers in business. When procedures aren’t clearly outlined, confusion and disagreements arise—both internally and externally. With documented systems, expectations are aligned and workflows are smoother, reducing the chances of crossed wires.

Scale Your Business

Systemisation makes scaling much simpler. Clear procedures help onboard new hires more efficiently, reduce stress on current staff, and ensure quality standards are met. With proper training materials and documented workflows, your team can grow without compromising performance.

Better-trained employees make fewer mistakes and work more productively, leading to increased sales, fewer corrections, and lower overall costs.

Measure Your Progress

Financial figures are only one measure of success. With systemised procedures, you can also track other critical elements—such as marketing effectiveness or product development timelines. These insights provide a clearer picture of your business's overall health and help you make informed decisions.

Meet Deadlines

Without a plan for handling daily operations, minor tasks can pile up and lead to delays in crucial areas. For instance, missing regular accounting updates can cause a backlog that disrupts payroll or tax preparation. A systemised schedule keeps everything on track and avoids such bottlenecks.

Free up More Time

With streamlined operations, you'll spend less time on repetitive admin and more on strategic tasks like networking, marketing, or developing new offerings. Systemisation allows your business to keep running—even when you're away from your desk.

Take Time Off

Perhaps the most appealing advantage of systemisation is freedom. When your business functions independently of your constant input, you can take time off without fear of operations grinding to a halt. That freedom is a hallmark of truly successful entrepreneurship.

Now that you understand the advantages of systemising your online business, take some time to reflect on your current setup. Write down your goals, no matter how vague or small they may seem—it's all part of creating a solid foundation.

Trying to do everything alone is a fast track to burnout. No matter how capable you are, success is far more achievable when you build a system that supports growth and sustainability. With proper systemisation in place, you're not just running a business—you're building one that runs without running you.

CHAPTER 2

START HERE: LIST YOUR MOST RECURRING TASKS

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Whether you already own an online business, or if you are planning on opening an online business in the future, you must find time to get into the swing of systemising your business.

Step One: Identifying Recurring Tasks

To start systemising your business, you need to begin by listing all the general functions that you do both daily and throughout 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. These are common tasks that will apply to every business:

Accounting

Having business systems in place for your accounting tasks will ensure 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. Effective accounting systems are also essential to make sure that you're paying your employees on time and that they have the right amount of taxes 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 all 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 systemised:

- 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 accounting 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 systemise because of the high turnover rate of most administrative roles. Putting systems in place can significantly reduce training time and eliminate the need to repeatedly explain simple tasks—like how to answer the phone—every time a new team member comes on board. . Administrative tasks that should be systemised:

- 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 great your products are, if people don't know they exist, your online business will never get off the ground. Marketing is all about creating strategies to reach your audience—identifying niche markets, positioning your product effectively, and crafting compelling copy and marketing materials.
Marketing is likely one of the areas where you spend the most time, often focused on generating new leads and encouraging potential customers to get in touch. The good news is that many of these activities can be systemised and delegated to your team.
More marketing tasks you can systemise to save time and increase efficiency:

- 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 member 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 often group sales and marketing together, assuming they're the same—but while they're closely connected, they serve distinct roles in driving business growth. To create a truly systemised business, they must be treated as different functions within the company. While marketing is about getting the word out about your business, sales are about following leads and converting prospects into paying customers. Some of the sales systems that you can systemise:

- 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 help 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 helps keep everything organised. When your team knows exactly where information should be stored and how to handle it, you can avoid clutter and prevent piles of paperwork from building up around the office. Data management systems that can be systemised:

- IT management
- Data backup
- Computer repairs
- Electronic information storage
- Client files
- Project files
- Point of sales system
- Financial data management

It's essential that your data management systems include a reliable backup solution. This safeguards your data—and your business—if something goes wrong with your server or software.

Human Resources

Even if your online business involves just one other person, someone still needs to ensure you're operating within the relevant guidelines and regulations for your industry. Managing HR policies and procedures can become quite complex, so it’s important to delegate this responsibility to someone with a keen eye for detail and the ability to handle large amounts of information effectively.

Along with creating systems for hiring, firing, and training employees, your HR systems should 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 that are provided with clear expectations and clear structures are happier and more productive in their positions. Creating a clear and comprehensive training manual will save you the time and effort of personally training each new staff member.

Communication

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

Your communication systems offer a significant opportunity for systemisation. Ensure consistent messaging and interaction across your business by systemising:

- Internal memos
- 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 covers all aspects of the customer experience, including the visual elements of your business, the products or materials they interact with, and the quality of their interactions with your team.

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 systemised:

- 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 your online business is, there will always be times when you need to make purchases. Whether it’s basic office supplies, occasional software, or promotional materials, having a clear process in place ensures you never run out of the essentials. Some of the purchasing systems that you can systemise include:

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

It's important to have someone in your company who can build and maintain strong relationships with your vendors, ensuring you consistently get the best prices on the goods and services you purchase.

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 start a business, you need a core product or service to offer potential customers. This makes product development one of the most vital functions in your business—and it should be a top priority from the outset. As your business grows, product development will remain a key focus, since ongoing improvements and refinements are essential to staying competitive in the market. You'll also need to develop complementary products over time, expanding your core offering to meet customer needs and keep your business evolving.

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 run a successful online business without a reliable website and properly functioning equipment. It's essential to have someone in place who can build and manage your site, as well as keep your systems running smoothly—ideally before you even 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 departments and have separate policies documented for the processes that go along with each task.

Once you've reviewed your list and prioritised the most critical functions needed to launch your business, the next step is to develop the policies and procedures that will keep it running smoothly—even when you're not around.

Step 3: Developing Policies and Procedures

Once 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, 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 on 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

Administrative policies and procedures should provide clear guidelines on tasks such as employee scheduling, drafting letters and general correspondence, organising and maintaining the filing system, booking travel for department staff, and ordering office supplies.

Sales, Marketing, and Customer Support

The sales, marketing, and customer support teams all need clear guidelines on how to interact with the public. Marketing should follow standards for creating compelling adverts that resonate with the target audience, while sales and customer support staff must represent the company professionally when engaging with prospective and existing customers.

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. 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, you can utilise templates and samples from the internet, or obtained from other companies. There is no point in 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 to document your policies and procedures, you could 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 test your processes, consider whether they can be adjusted or improved to ensure your business continues to run smoothly—even when you're not there.

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, and 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 entirely overhaul the way you do business.

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 diagraming 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, 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. Firstly, 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 identify areas where communication can be improved, procedures clarified, and steps streamlined—saving 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 can be completed in a matter of minutes, others will take days or weeks to accomplish. Building a solid foundation when you are starting your business will save you a considerable amount of time and money once you have your company up and running.

CHAPTER 3

TOOLS FOR SYSTEMIZING YOUR ONLINE BUSINESS

Chapter 3: Tools for Systemizing Your Online Business

If you want to build a successful business that is capable of generating steady, predictable sales, you must 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, there are tools that 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:

Asana

Asana (https://asana.com/), is a powerful tool designed to help you and your team manage work more efficiently. Originally built for organisations, it's just as valuable for individuals running their own business—especially if you're looking to systemise operations and improve collaboration.

Asana reduces reliance on email by keeping all team communications within the platform. Whether you're managing large projects or breaking down personal to-do lists, Asana helps keep everything organised and on track.

One of its key strengths is the ability to break down tasks based on due dates, assigned team members, and individual projects. This makes it easier to manage both collaborative efforts and solo responsibilities.

Key benefits of using Asana:

- Allows you to delegate tasks quickly and clearly
- Integrates seamlessly with Google Drive and Dropbox for easy file sharing
- Offers a free plan, making it accessible for small businesses and solo entrepreneurs

Asana is a great starting point for anyone looking to bring more structure and clarity to their business processes.

Ontraport

Ontraport (https://ontraport.com/) is an all-in-one business automation platform that consolidates your tools, customer data, and marketing efforts into a single, streamlined system. It offers true marketing automation, allowing you to reach your audience through email, SMS, postcards, and more—all from one dashboard.
In addition to marketing, Ontraport enables you to sell your products, services, and programmes with built-in payment processing through PayPal or your chosen merchant provider. It's an ideal solution for entrepreneurs and growing businesses looking to systemise operations and scale efficiently.

Key benefits of using Ontraport:

- Maps your entire customer journey on a single campaign dashboard, providing a complete view of your business performance
- Tracks who's converting, where they're coming from, and their lifetime value —tying this data back to specific marketing campaigns
- Offers a wide selection of pre-built templates (including emails and landing pages), or you can build custom campaigns from scratch with its intuitive tools

Ontraport is a smart choice if you want to integrate marketing, sales, and customer management into one cohesive system.

Slack

Slack (https://slack.com/), is a user-friendly communication tool designed to streamline collaboration within your business. From launching projects and onboarding new hires to reviewing contracts and running A/B tests, Slack allows your team to manage it all in one central location.
By bringing together messaging, file sharing, and integrations with other tools, Slack helps your team save time and stay aligned—no matter where they're working from.

Key benefits of using Slack:

- Organised conversations through channels, which can be structured by team, project, or client. Team members can join or leave channels as needed, and threaded replies keep side discussions from derailing the main topic.
- Searchable message history, allowing users to look up past conversations and solutions—helping turn everyday communication into a shared knowledge base.

Deadline Funnel

Deadline Funnel (https://www.deadlinefunnel.com/) is a powerful tool that helps you add urgency to your sales strategy by using personalised countdown timers. It allows you to run live product launches through webinars or create fully automated mini-launches, where each visitor sees a unique countdown that aligns with their individual journey.
By using Deadline Funnel, you can build evergreen campaigns that feel timely and exclusive to every subscriber—boosting conversions and keeping your marketing funnel active around the clock.

Key benefits of using Deadline Funnel:

- Create deadline-based campaigns for product launches, with the option to apply the same deadline for all users
- Integrates with popular business tools like ActiveCampaign, HubSpot, MailChimp, and Ontraport

Lead Pages

Lead Pages (https://www.leadpages.com/) his a user-friendly platform that helps businesses create eye-catching opt-in campaigns with ease. It enables you to quickly capture leads, convert prospects into customers, and seamlessly integrate your campaigns with your favourite digital marketing tools.

Key benefits of using Lead Pages:

- Create mobile-friendly templates that automatically adapt to your audience's preferred devices
- Build effective ads with the integrated Facebook Ad Builder, which pulls content directly from your page to generate compelling ads instantly
- Optimise campaign performance by testing multiple ad versions side-by-side, allowing you to keep what works and discard what doesn't

Calendly

Calendly (https://calendly.com/) is a smart scheduling tool that eliminates the need for back-and-forth emails when setting up meetings. You can create custom availability rules and share your Calendly link via email or embed it directly on your website. It integrates with your existing calendars—whether you use Outlook, Google, iCloud, or Office 365—so you never risk being double-booked.

Key benefits of using Calendly:

- Full control over your schedule, with options to add buffer times between meetings, block last-minute bookings, create private events, and more
- Flexible meeting types, including one-on-one, round-robin, and group meetings based on joint availability
- Seamless integration with popular business tools like Salesforce, GoToMeeting, Zapier, and many others

GoToWebinar

Webinars have become a key part of many online business strategies. GoToWebinar (https://www.goto.com/meeting) makes it easy to connect with employees, prospects, and customers—whether you're delivering a presentation, running a training session, or hosting a product launch.
Capable of handling large audiences, GoToWebinar transforms presentations into conversations and conversations into conversions. It’s a valuable tool for businesses of all sizes looking to engage and grow their audience.

Key benefits of using GoToWebinar:

- Automated email tools allow you to send customised invitations, confirmations, and reminders—saving time and keeping your attendees informed
- Brand personalisation options let you display your company logo and custom images across your webinar materials
- Video sharing capabilities enable you to upload MP4s, share YouTube clips, or stream promotional content to enhance your webinars with high-quality visuals

DropBox

Dropbox Business (https://www.dropbox.com/business) allows you to scale your company without limitations, while maintaining full control over your sensitive data and team activity. With flexible storage options and robust file-sharing tools, it’s an ideal solution for teams that need reliable, secure collaboration.

Key benefits of using Dropbox Business:

- Administrator dashboard lets you monitor team activity, manage connected devices, and audit file sharing—all from one central place

- Remote wipe feature protects sensitive data by allowing you to delete files from lost or stolen devices
  Dropbox Paper provides a simple yet powerful way for teams to create, share, and collaborate on documents, with built-in admin controls for better oversight

Google Docs

Google Docs (https://docs.google.com/) is a powerful, cloud-based document creation and editing tool that allows teams to collaborate in real time. With instant syncing, it minimises the risk of overwriting others' contributions and keeps everyone on the same page. Its intuitive editing and formatting tools make it easy to create professional documents quickly and efficiently.

Key benefits of using Google Docs:

- Professional templates – Choose from hundreds of pre-designed templates for reports, CVs, and more to give your documents a polished, professional look and save time on formatting
- Anytime, anywhere access – As a web-based tool, Google Docs lets you and your team create, access, and edit documents from any device—even offline
- Automatic saving and revision history – Every change is saved in real time, with a full version history that allows you to review and restore previous edits based on time or user

Google Calendar

Google Calendar (https://calendar.google.com/). is a smart, easy-to-use scheduling tool designed to help you get the most out of your day. It simplifies the way you organise your time, so you can spend less energy managing your schedule and more time focusing on what matters.

All your events are stored online, so if you lose your phone, your calendar remains safely backed up and accessible from any device. With features like Assists, you can create events in just a few taps, while Smart Suggestions help you quickly add event titles, participants, and locations.

Key benefits of using Google Calendar:

- View your schedule by day, week, or month, easily invite guests to events, and access your calendar from the web
- Events from your Gmail account are automatically added to your calendar, saving you time and reducing manual entry

WebinarJam

WebinarJam (https://home.webinarjam.com/index) offers business owners a powerful and flexible platform for hosting high-quality webinars. With its excellent value and advanced features, it allows you to invite up to six co-presenters, making it one of the most effective collaboration tools on the market. The platform is fully compatible with all major browsers, operating systems, and devices—ensuring a smooth experience for attendees, regardless of how they join.

Key benefits of using WebinarJam:

- Draw and annotate directly on your screen, transforming whiteboard ideas into real-time visuals
- Perfect for delivering interactive presentations, training sessions, software demos, lectures, and mind maps

Screencast-o-Matic

Screencast-o-Matic (https://screenpal.com/) provides everything you need to create, manage, and share videos with your team. Whether you're using it as a full end-to-end solution or just for screen recording and video editing, its intuitive interface and powerful features make it ideal for businesses of all sizes.

Key benefits of using Screencast-o-Matic:

- Advanced screen recording – Capture your screen or webcam while adding text annotations, shapes, or freehand drawings. You can also import, export, and mix in other video and audio content seamlessly.
- Smart video management – Organise your video library by topic, customise viewer permissions, and enable features like comments and notes with just a few clicks.
- Seamless integration – Use API support to incorporate Screencast-o-Matic into your training, communications, support, or learning management systems.
- Screencast-o-Matic is a versatile tool that simplifies video creation and boosts team collaboration through effective visual communication.

HootSuite

HootSuite (https://www.hootsuite.com/). empowers you to do more with your social media by enhancing engagement and streamlining automation. Supporting over 35 global networks—including Twitter, Facebook, Instagram, and LinkedIn — HootSuite helps you stay active online and reach your audience effectively.
It also identifies key influencers in your industry and can automate elements of your social media strategy, making it easier to manage a consistent online presence.

Key benefits of using HootSuite:

- Efficient post scheduling – Save time by scheduling all your social media posts in advance through a simple, user-friendly interface. Keep your profiles active 24/7 by planning and publishing hundreds of posts automatically.
- Social analytics and ROI tracking – Measure the performance of your social campaigns with detailed reporting tools. Track conversions, compare paid vs owned media, and evaluate the return on investment for each social channel.

Keap

Keap (https://keap.com/) is an all-in-one marketing and CRM solution tailored specifically for small businesses. It allows you to automate lead capture, scoring, and audience segmentation with powerful customer relationship management (CRM) features. You can also integrate with hundreds of third-party business services through its extensive app marketplace.

Keap brings all your customer information into one central location, making it easy to review past interactions and manage client relationships more effectively. Its user-friendly dashboards and reporting tools show you exactly how your audience is responding to your campaigns.

Key benefits of using Keap:

- Attract more customers by creating targeted follow-up email campaigns tailored to your audience's behaviour and preferences
- Streamline your sales process with marketing automation that guides leads through the funnel and helps you build a reliable, scalable sales pipeline
- Track performance easily with clear analytics that show you what's working —and what's not—so you can adjust your strategies accordingly

MailChimp

MailChimp (https://mailchimp.com/) is a leading email marketing platform known for its affordability and ease of use. Designed to help small businesses grow, Mailchimp offers powerful marketing automation tools that let you target customers based on specific behaviours, preferences, and data points.

With its flexible scheduling and segmentation tools—alongside robust APIs—Mailchimp integrates seamlessly with a wide variety of web technologies. This makes it ideal for businesses looking to automate their marketing while keeping things efficient and scalable.

Key benefits of using Mailchimp:

- E-commerce integration – Connect your store to one of hundreds of e-commerce platforms to build targeted email and ad campaigns based on customer behaviour
- Smart automation – Ensure your messages reach the right people at the right time, using data-driven triggers based on customer preferences and previous purchases
- Ad campaign expansion – Easily create and manage ads on Facebook, Google, and Instagram to extend your reach and boost your bottom line

Salesforce

Salesforce (https://www.salesforce.com/) is one of the world's leading platforms for business automation and customer relationship management (CRM). It offers a robust suite of marketing and sales automation tools, and its extensive API marketplace enables seamless integration with hundreds of third-party business applications.
Salesforce helps elevate your digital marketing strategy, streamline operations, and personalise customer interactions at scale.

Key benefits of using Salesforce:

- Manage contacts and track opportunities from any device, ensuring your sales pipeline stays up to date
- Use Sales Cloud Einstein to turn customer data into closed deals with predictive scoring, actionable insights, accurate forecasting, and intelligent automation
- Build a comprehensive view of each customer to deliver personalised, one-to-one experiences that drive engagement and loyalty

IFTTT

Standing for “If This Then That,” IFTTT (https://ifttt.com/) is a simple yet powerful automation tool that helps businesses connect and automate tasks across a wide range of web services and devices. It allows you to create applets—a more current term than the older "recipes"—that perform specific actions based on predefined triggers.

With over 240 third-party app integrations available, IFTTT enables you to automate workflows and streamline operations across your digital ecosystem.

Key benefits of using IFTTT:

- Connect your apps and smart devices in innovative ways, all at the 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

HOW TO DOCUMENT YOUR PROCESSES: HOW TO CREATE SOPS

Chapter 4: How to Document Your Processes: How to Create Standard Operating Procedures (SOPs)

To truly systemize your business and ensure that it continues to run smoothly, you have to document your processes and create a Standard Operating 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. SOPs not only simplify and standardize every task in your business, but they also ensure that no process relies on just one team member.

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 elements must be included in the draft for the process to be effective. Drafting the document itself is straightforward—think of it as having a conversation with the person who will be completing the task. You're essentially providing step-by-step written instructions that guide them from start to finish.

Including visuals can be especially helpful. Clear photos can enhance understanding, particularly for more hands-on tasks. For complex or multi-step processes, short videos can be an excellent way to demonstrate how something is done. The ultimate goal when documenting your procedures is to clearly and completely explain the task, leaving no room for confusion about how or why each step is performed.

Develop Naming Conventions

Before you begin writing your SOPs, it’s important to establish a standardised naming convention for all documents you create. A consistent naming structure helps keep your documentation organised, makes it easier for team members to find the right materials, and supports long-term scalability. Even if you start with just a few procedures, your collection will grow alongside your business.

What are Naming Conventions?

Naming conventions refer to the structured way you name documents. The goal is consistency—so you and your team can quickly understand the type and purpose of each SOP at a glance. A good naming system should be logical, easy to follow, and meaningful to everyone involved.
Avoid obscure or overly complex abbreviations, as they can discourage writers from using the system and lead to inconsistencies.

Tips for Creating Effective Naming Conventions:

- 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_RecievingProducts_v1_1_21

Before you begin drafting SOPs, it's also important to consider how they will be managed in the future. As your document library grows, you'll need a clear system for handling different versions and tracking their status. Document your naming conventions clearly so that anyone taking over the SOP process can maintain consistency across all future documentation.

Writing Your First Procedure

Standard operating procedures (SOPs) are simply step-by-step instructions for completing a specific task. To write an effective SOP, you need to put yourself in the position of the person performing the task. Write from their perspective and aim to make the instructions as clear, concise, and easy to follow as possible.
When documenting your first procedure, keep the following guidelines in mind:

- Use the present tense. Write as if the user is performing the task now.
- Be specific. Avoid vague language—clarity is key.
- Be concise. Use clear, simple language to communicate each step.
- Keep steps in logical order. Each step should naturally follow the one before it.
- Highlight exceptions. Use symbols or notes to flag any exceptions and explain how to handle them.
- Highlight any exceptions. You can use a symbol to flag the exceptions and how to go about handling those exceptions.
- Emphasise warnings. Important safety or cautionary notes should stand out —use bold text, a larger font, or a different colour.
- Define acronyms. Always explain the meaning of any acronym before using it in the text.
- Number each step. This makes the process easy to follow and reference.

Finally, before the procedure is implemented, take time to review all action steps and carry out a risk assessment. This ensures the process is both efficient and safe before any work begins.

Numbering the Steps in the Procedure

Every procedure should clearly outline all the actions required to complete the task. To keep things simple and easy to follow, list each action step in sequential order, starting at 1 and continuing upward.

The most important aspect of numbering is consistency—stick to the same style throughout the document. Avoid switching formats partway through your SOP.

Numbering each step helps ensure that the reader begins in the right place and follows the process as intended. It removes confusion and guarantees that everyone in the organisation performs the task the same way, every time.

Creating the Action Steps for Your Processes

The action steps are 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 take other factors into account—such as different ways a task might be carried out, any secondary functions that need to be completed, and related procedures. To finalise the system, it helps to put it into context by considering where it fits within the bigger picture, what the user should complete beforehand, and any actions that should be avoided.

Procedures for Creating Action Steps

When writing procedures for your business systems, it's important to follow a consistent structure that helps users understand what needs to be done and how to do it. Follow these four key steps:

1. Start with a Summary Sentence
Begin each procedure with a brief summary that explains the purpose of the task. This sentence helps orient the reader and lets them quickly confirm they're on the correct page. Keep the summary short and concise.

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

2. Identify the Main Task

The heading of the procedure should clearly identify the main task being performed. Use a verb ending in “-ing” to describe the action.
Example Heading:
Receiving Product Orders

3. Write Out the Action Steps
List each step in the procedure clearly and in sequential order. Number each step to show the exact order in which they should be completed.

Example Action Steps:

1. Verify that the items being received match what was ordered by performing the following checks.

2. Confirm that the product quality meets your specified standards.

3. If everything meets your expectations, accept the order by signing the invoice. If not, follow the procedure for rejecting the product and request a credit memo for any items being refused.

4. Once the order is accepted, move the products into storage.
Prioritise handling refrigerated and frozen items first.

4. Include Sub-Steps Where Needed
If any step involves multiple smaller actions or checks, break these out as sub-steps. Use a lettering system (e.g. 1.a, 1.b, 1.c) and indent each one so the reader understands these fall under the main step.
Example Sub-Steps for Step 1:

1.a Verify that the items being received match what was ordered by performing the following checks:

1.b Check the product quantity and weight to ensure it matches the invoice.
1.c Check the unit price on the invoice against the purchase order to ensure they match.

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 has 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 tes 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 to 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."
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 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 your processes allows you to systemise your business, freeing up your time to focus on more critical tasks and ensuring everything runs smoothly—even when you’re out of the office.

CHAPTER 5

HOW TO OUTRCOURCE TASKS LIKE A PRO

Chapter 5: How to Outsource Tasks Like a Pro

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, achieving the same level of efficiency as a larger corporation requires outsourcing many of your business's essential functions.

When most people think of outsourcing, they imagine a "superstar virtual assistant" handling everything. Unfortunately, that's far from reality. No online business runs entirely on autopilot. To succeed, you need to stay actively involved, especially when it comes to making key decisions.

Outsourcing is most effective when you have a clear framework and well-documented processes in place, enabling anyone to carry out the required tasks with consistency and confidence. 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 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’s a five-step process for finding and hiring top-quality freelancers. By applying this strategy to each new hire, you’ll build a reliable team of skilled professionals who consistently deliver high-quality work across all your projects.

Step One: Identify Your Outsourcing Task

To be successful, you have to start every project 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 identify 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 element that you need your freelancer to possess.

Step Two: Write Your Project Description

Most freelance websites 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, 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

Instead of using a clever or vague project title, opt for a clear and concise description that outlines the specific work you need completed. This helps attract the right candidates from the start. 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 catchy header. You want people who are interested in this project, not bidding merely because they need the work.

Element Two: List the Required Skills

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. 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, it's 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.

Element Four: Provide Specific Parameters

It is essential that the description you write for the project is 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

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 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 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 detail 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 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 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 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 vs. 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 analysing 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. 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, it 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. Once you have a few qualified freelancers chosen, you can 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. 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 consider when making a final decision:

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 smaller 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, take some time to look at each of their portfolios to see if they show any interest in your industry. 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 get 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 feels like a better fit than the others, they are the one that you should hire.

Finding qualified freelance workers to help you work on the documents you've created will help you build a successful business that is fully systemised.

CHAPTER 6

SYSTEMIZATION USING AUTOMATION TOOLS

Chapter 6: Systemization Using Automation Tools

As a small business owner, you could be losing around 10 to 15 percent of your time by not automating simple tasks—such as posting on your business's social media accounts. Business automation improves 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 systemise your business.

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 connections 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 multi step 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 contacts and sales 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, 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 field 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

IFTTT (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 IFTTT 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 apps are easy to use and support IoT devices and voice assistants like Google Assist and Amazon Alexa.

Shortcat

Shortcat (https://shortcatapp.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 hold 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 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

HOW TO SCALE 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 gives you the freedom to focus your skills on growing the business in the areas where you excel, which is where most people try to start their online business

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 have a distinct advantage over many other small business owners. While others often find themselves overwhelmed—juggling countless tasks and struggling to keep up—you've built a reliable system that frees you from handling every small detail yourself. Instead, you can focus your energy on what you do best: using your unique talents to grow and scale your business.

Scaling your business can feel overwhelming—especially when you're already juggling work and home responsibilities. While it may be difficult to carve out time to focus on growth, getting organised beforehand is key to making the process manageable. A large part of successful scaling is simply about putting the right systems and structures in place before you begin ramping things up. With that foundation, the following guidance will help you tackle the process with clarity and confidence:

Create the Right Strategic Plan

Your strategic plan is the roadmap that guides your company's focus toward fewer, high-impact priorities—the kind that help you dominate your market niche and unlock significant growth. It encourages you to step back and look at the bigger picture. It also helps you prioritise and allocate resources where they'll make the greatest impact. Most importantly, it aligns your team with the company's vision, so they can better manage their responsibilities and contribute meaningfully to its goals.

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 in that quarter to grow and develop your business.

This process works so well because it encourages you to take a fresh look at your business every three months, while giving your team the opportunity to focus deeply on executing meaningful progress in the most important areas. When done effectively, these 90-day sprints offer your business valuable opportunities to adapt to market demands and deliver lasting results.

Measure Effectiveness with Accounting

Strong systems naturally boost efficiency across your business, helping you and your team consistently achieve goals and deliver what your customers need. Your accounting system should serve as the central hub—measuring the effectiveness of all your business processes.

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 weaknesses 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 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.

Developing 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 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 Performance Indicators", known as "KPI's" 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 your KPI's, 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

If you want to scale your business sustainably, you need to shift from relying on your personal output to building growth on a solid foundation of systems, teams, and controls.

Sales encompass everything your business does to make its offers valuable and to close deals. These offers can be delivered through various channels, such as call centers, trained sales representatives, sales letters, interactive websites, and more. Ultimately, it's your sales and marketing efforts that attract clients, drive conversions, and grow your revenue.

Many small business owners focus on sales and marketing out of necessity rather than desire. The idea of selling can feel intimidating, but to build a successful business, it's essential to direct most of your energy toward generating profitable sales. Without this focus, your business won't just struggle to grow—it may not survive at all.

When you first start your venture as a small business owner, you focus your time and energy on 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 in removing obstacles to scaling your sales and marketing efforts is identifying 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, 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.*

Underline 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 issue with relying on informal systems is that they leave your business exposed. If you fall ill or become overwhelmed, no one else knows how to carry out the essential processes that only exist in your head. When key knowledge is undocumented and held by just a few people, it becomes a bottleneck—and ultimately, it limits your ability to scale. Here are five steps to help you build a solid baseline lead-generation system, laying the foundation to scale your business effectively:

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 effective one. This will be the tactic that you will systemise first. If you're not sure which one is the most effective, 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 process.

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 consider the best format for packaging the key stages of the system to ensure 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, and 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 in 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 pre campaign 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 (any digital or printed material used to communicate or promote your company's brand message, products, or services) 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'll need talented team members who can both drive growth and support it as it scales. 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 most effective ways to create and sustain rapid growth is by intentionally building a business that consistently attracts and retains top talent. . Here are some simple ways in which you can do that:

- Deliberately define and profile your ideal employee. While 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 into your hiring process to weed out any candidates that don't fit into your profile.

- Be selective about who you invite onto 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 and when 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 start involving them in generating ideas to scale and enhance your business. Every six months, ask each of your team members to go through the company, department by department and write their three best ideas for scaling and improving your business.

Then spend some time going over the results. Take the top suggestions and hold a team meeting to go over the results and allow the team to help you pick out several of the best ideas to implement in the company immediately.

Repeat this process regularly and you’ll see your company grow and improve through the ideas generated, while your team becomes more engaged and motivated as they see their input being valued and put into action.

CONCLUSION

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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. The more your business grows, the more that growth will demand you to adapt and refine your systems.

Rapid growth will place growing pressure on outdated systems. What worked for a £500,000-a-year business won’t be enough to support a company turning over £5 million. That’s why your systems and controls must be treated as ongoing work—continually evolving as your business scales.