

Welcome!

Visionary entrepreneurs often feel like they are drowning in the chaos of their own business. We want to find new and exciting investments but can't because they are handcuffed by their day-to-day operations! That's where most successful people lose efficiency - spending more time as an employee rather than on things that will grow or scale up their company. As a visionary that is not where you shine in your business. Big ideas and forward thinking are where your zone of genius is. What would it look like to you if you could automate a lot of your day to day so you can do more of things you love?

That is exactly why we are here. This guide will show you how to leave your entrepreneurial “I have to do everything myself” mindset and ascend into being the true visionary of a thriving business.

Keeping your business stored in your brain or constantly doing manual tasks that consume your time is where most entrepreneurs get stuck. We are here to help you create an efficient workflow for your company's business processes.

We'll cover operating procedures, marketing, sales and fulfillment, customer support, client onboarding, and content creation. Each topic includes specific ways that you can create and improve systemization (organizing) and automation in that area of your business.

No matter where you are in systemizing and automating your business, the tools provided here will help turn that chaos into clarity.

This is the same process I used to run meetings when I was the Automation lead for an International Engineering Team for \$6 billion global software company NCR.

Even if you've already automated and systematized some of the areas discussed in the workbook, be sure to read through each step anyway. You'll likely discover a tip or new tool to help improve efficiency.

As you are going through each step come and tell us about your growth and clarity inside of your business, we love to hear from you inside of the Automate Your Hustle Group!

Let's dive into the steps!

Step 1: Document Your Business Processes with SOP's (Standard Operating Procedures)

Creating SOPs (Standard Operating Procedures) are the first step we take our clients through when setting up automation and systems. SOPs are important for running a smooth business operation. With documented processes in place, you won't have to think about everything when you start working or when you need to delegate a task, leaving more time for the important things.

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

To cut down on the time you spend writing down the processes, turn to templates and samples found on the internet or obtained from other companies. There is no point in your spending your valuable time reinventing the wheel. A lot of the information that you need has already been written and can be customized to work for your company with minimal effort on your part.

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

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

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

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

the point of starting to hire out and looking into a VA. This is the best way to make sure the onboarding and training is in place, so no time is wasted. Having SOPs means you won't have to worry that the loss of key people could cripple your business.

How to Document Your Business Systems

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

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

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

Develop Naming Conventions

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

What are Naming Conventions?

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

with writing the SOPs may stop using the guidelines. The following are important guidelines that you should follow for naming your SOP documents.

- Client Name or SOP Document Owner - e.g., SHM
- 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., 10

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

SHM_PUR_SOP_ReceivingProducts_v1_1_21

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

Writing Your First Procedure

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

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

- Include the meaning of acronyms before placing them in the text.
- Number each step in the process.

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

Numbering the Steps in the Procedure

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

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

Creating the Action Steps for Your Processes

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

Procedures for Creating Action Steps

- 1. Include a summary sentence.** Before you write any steps in your procedure, you will want to open with a summary sentence that explains what will be achieved by performing the process. The summary sentence helps to orient the reader, so they know with a quick glance if they are on the correct page. You want to keep the summary sentence short and concise. Below is an example of a summary sentence for receiving products.

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

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

Receiving Product Orders

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

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

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

1. *To verify that the items that are being received match what was ordered, you need to perform the following checks.*
 - a. *Check the product quantity and weight to ensure that the amount that is stated on the invoice matches the order that you are receiving.*
 - b. *Check the product unit price to ensure that the unit price on the invoice matches the unit price on the purchase order.*

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

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

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

For More Information:

Checking Temperatures of Key Items

Storing Products

Chemical Storage

Rotating Products

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

Creating Sales Receipts

1. Open QuickBooks
2. On the QuickBooks homepage, select the "Create Sales Receipt" icon.
3. Track the sale by entering a customer or job name into the space designated "Customer Job."
 - a. For existing customers, use the arrow next to the space to select an existing customer from the pull-down menu.
4. Click on the item column to enter the item sold. Either select an existing item from the drop-down menu or enter a new item name in the space provided.
 - a. If the item is new, select the item type from the "Type" menu located in the "New Item" pop-up window.
 - b. Enter a description of the item in the "Description" window.
 - c. Select the account type that the income from the sale will apply to using the "Account" menu.
 - d. Enter the price of the item and tax code in the appropriate box.
 - e. Press the "Save & Close" button to return to the sales receipt window.
5. In the Sales Receipt Window, select the quantity sold.
6. Click on the "Payment Method" arrow to select the payment method used for the sale.
7. Place a check in either the "to be printed" box or the "to be e-mailed" box to select whether to print or email the receipt to the customer.
8. Click on the "Save & Close" button to save the receipt for your records.

Implementing Your New Standard Operating Procedures

After you've documented your business systems, you will need to begin implementing them in your daily operations. Before you fully implement them, you will want to take the

time to test and measure each documented process to ensure that it works, without your involvement.

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

Get Employee Buy-In

As you develop and revise your new business systems, involve your employees as much as you can. Your employees are the ones who have been completing the tasks and will be the ones who will be using the newly documented systems moving forward. You can even have the employees develop the initial draft of the processes, leaving you to review and establish the final versions. This can help to speed up the process and gives your staff ownership of the process.

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

Step 2: Improve Your Onboarding Experience

An effective onboarding process will save you a ton of time, simply because you're not having to hunt down or recreate documents, message back and forth for necessary information, or waste time on clients who aren't a good fit. In this step, you'll learn the value and use of intake forms, welcome packets, and online appointment scheduling.

We break this down into 2 phases:

1. Lead/prospect
2. Clients

Phase 1 - Onboarding Experience: Lead/Prospect

Phase one addresses another time-consuming, yet critical, aspect of a successful business: customer service pre-purchase. This is one of the most important steps because this helps convert the lurkers into buyers.

People naturally will have questions about working with you, your business, logistics of a product or service, and troubleshooting issues. It can suck the time and energy out of you or an assistant to respond to every single email or call.

This is especially true since many people will have the same questions and concerns about working with your or purchasing one of your products. You can solve this issue by creating a Frequently Asked Questions (FAQ) page for your website.

FAQ Page

A well-put-together FAQ page is one of the most important and valuable pieces of content on your website. It will save you and your team hours of time responding to emails and inquiries. When done correctly, a FAQ can also do the following:

- It sets expectations with customers regarding terms and conditions and refund policies.
- It highlights your business' brand and personality. As a result, the FAQ page will help you attract the right customers to your business.
- It addresses your potential customers concerns or worries. This creates a simple,

and cost-effective way to help an interested person overcome any objections or misconceptions about your product or business.

Your FAQ page should include the most common questions you get asked. It should also answer questions your potential customer is thinking but might not specifically ask. A FAQ page with the right questions will be the most helpful and increase conversions

Messaging Services

In addition to creating a useful FAQ page, you may want to consider using a help desk, Facebook messenger bot, and/or website chat bot. These provide your potential and current customers an easy way to quickly get their questions answered, resolve a complaint, or find out more information about a product or service.

Providing a quick and easy way for customers to get an immediate response to a question is important in our society where no one wants to wait for a resolution, plus it's just good service.

If you don't already use a messaging app for customer service questions, consider implementing one in your business.

Intake Form

Before chatting with a potential client on the phone or via email, you should have them complete an online intake form. Your intake form could ask what the person hopes to gain from working with you, their timeline, budget, and maybe even quirky items to get a feel for the type of person making the inquiry.

One of the main purposes of an intake form is to actively discourage non-ideal clients. This helps you and the potential client avoid wasted time setting up a first call and other logistics when you're just not a good match.

While you can use a free service such as Google Forms to build intake forms to collect data, another way to improve your onboarding process is by using a CRM. Google Forms only allow you to access data through the web browser, but CRMs let you access all of your data in real-time. By implementing a CRM, you can access all of your existing data in one place regardless of where you are or what device you're using.

Also, there's no way to sort Google Form responses, which makes it difficult to analyze

the data unless you build elaborate workarounds.

Client Relationship Manager (CRM)

You will be using a CRM for your leads and in the client's phase. If you find yourself wondering, aren't CRMs just for corporations with large sales teams? The reality is you don't have to be a big enterprise to benefit from a CRM. Implementing a CRM for your small business can help you not only organize your contacts, leads and deals, but also automate time-consuming processes like data entry, and instead focus more attention on forming strategies and interacting with customers.

This will help you to keep track of each lead stage of the sales process and allows you to automatically create tasks for yourself when certain steps are completed. Plus, it is a great place to put all your notes when speaking, and easily tracks the last time you followed up with them.

For example:

1. You could set up a task that sends an email reminder to schedule a follow up call 7 days after the last time you spoke.
2. You could set up a task that sends an email reminder to send over any information they are requesting to look at.

Using this system, you can be sure that nothing falls through the cracks, because all relevant information will already be in one place.

Phase 2 - Onboarding Experience: Client

Congratulations! You have successfully converted a prospect into a paying client, but now what? Think of the flow you send your current clients through and look at what steps are manual that you can automate.

Appointment Scheduling

Have you ever had this situation happen to you? Hey client! Can't wait for our onboarding meeting, what is your availability? Then they say, let me look and I will get back to you. It is a lot of back and forth before settling on a time and date.

Any appointments between you and your clients should be scheduled via an online calendar app. There are many options available on the market, including Calendly, and ScheduleOnce.

Automating appointment scheduling is a must for coaches and anyone who meets one-on-one with clients. Not only will you look more professional, but it saves the time and hassle of emailing back and forth to coordinate both parties' schedules.

Welcome Packet

Once a new client has signed on for your services or purchased a product, a welcome packet should be sent automatically from either your software or by an assistant.

The welcome packet serves a couple of purposes. First, it fills the space between when the client purchased your services and when your work together actually begins. And second, it allows the new client time to complete any requirements to be 100% prepared for your first call or other work together.

Onboarding Form

You already sent them one form to understand if this person is an ideal client, now we need to send a form to dive deep into their business to understand the things we need to know to help them.

Like the Intake Form this should be designed inside of your CRM to keep all your documents and notes in one place to easily schedule follow up tasks.

Client Relationship Manager (CRM)

Like the lead stage this keeps everything systemized and less overwhelming. You won't have to keep constantly thinking that you must send this email or schedule this call anymore. It is all store inside of your management system and with due dates and automated reminders.

This will help you to keep track of each client's progress and updates needed.

For example:

1. You could set up a task that sends an email reminder to schedule the first meeting

with your client when they complete the intake form.

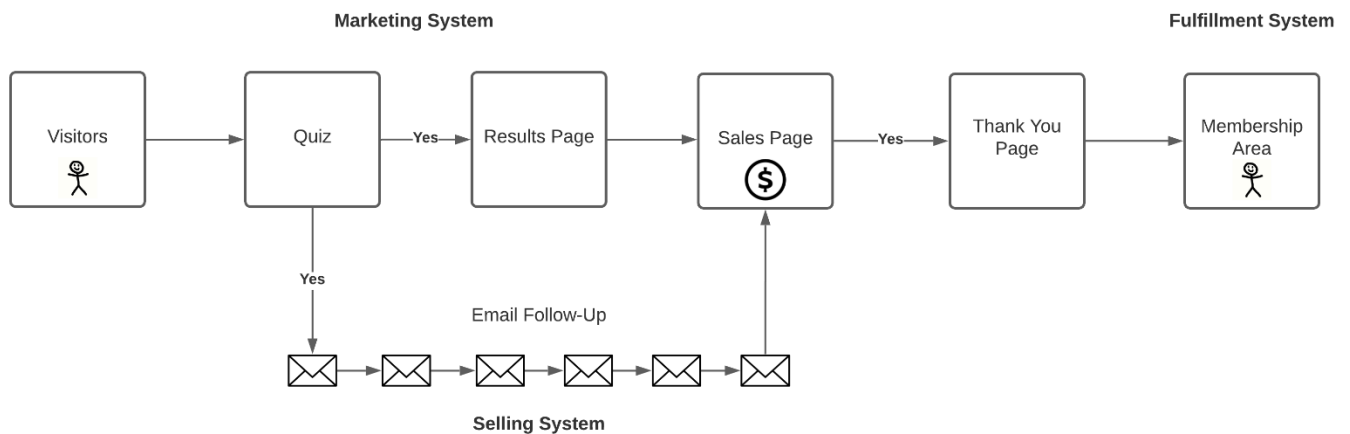
2. You could set up a task that sends an email reminder to follow up with your client after their first meeting to collect the service agreement and scope of work.

Step 3: Streamline Marketing, Sales & Fulfillment

Step 3 of systemizing and automating your business focuses on how you sell and fulfillment of your products. The process below is designed specifically for digital business owners, and if you are wanting a more personalized plan schedule a call.

This step is crucial for increasing your revenue without adding additional hands-on time.

There are 3 core systems of a business: Marketing, Selling and Fulfillment. We like to call this the **Freedom Engine**.

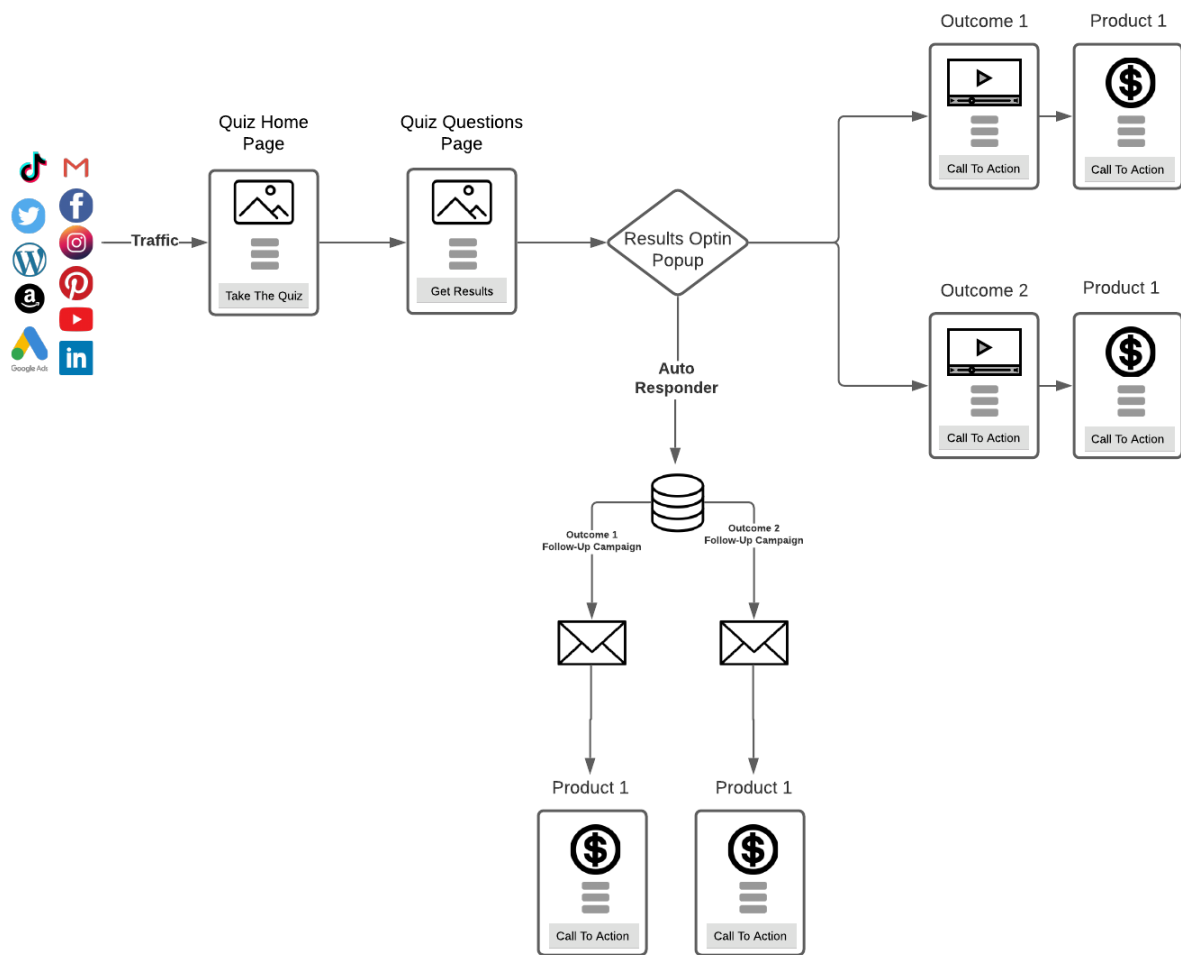


Once you get these systems in place, you can benefit from passive sales that don't require your (or a team member's) time or energy.

Create A Marketing System (Quiz Funnel)

The Marketing System is a core component of the Freedom Engine, whose sole purpose is to attract people into your sales funnel. It's designed and optimized to convert interested prospects into buyers.

Over time, we have changed up the style of our lead magnet to use quizzes to get better and more hyper-qualified leads into our funnel.



A funnel is a system of steps that helps encourage a potential customer to take the action you want them to take by providing specific information at the right time. It's called a funnel because at the beginning of the process there are a lot of people who take the first step. As people go along the next steps, many drop out until only the most interested buyers are left.

There are typically four stages of a funnel, also known as **AIDA**: awareness, consideration, developing a preference or desire, and making a purchase (or taking a different action, such as registering for a webinar or signing up to your email list).

An optimized sales funnel is a highly automated way to convert your site's visitors into clients. Done correctly, a sales funnel is a great way to monetize your business.

The best part about funnels is that once you set it up, you don't have to do anything for

each new person who starts to go through. **Your funnel will automatically help the right people take the action you are encouraging.**

Additionally, once a person goes through your funnel and becomes a paying customer, they are much more likely to talk about your business and products to their friends and family. You can then benefit from the power of word-of-mouth marketing.

As you expand your reach, you will increase your revenue potential. All without having to work more hours. **It's all about hustling smarter, not harder.**

Create A Selling System (Email Marketing)

Another important element to automate in your business is email. An email autoresponder is a sequence of email marketing messages that are sent to subscribers in the order and frequency you decide.

Programs that facilitate autoresponders, such as ActiveCampaign, Klaviyo, ConvertKit, and many others, allow you to tailor the right message to be delivered to the right customer at the right time.

Using email autoresponders create a seamless, consistent, and reliable way to communicate with your subscribers.

For example, you can set up a welcome autoresponder email series for new subscribers. You can also use email autoresponders for product launches, customer onboarding, and content delivery (such as online products or programs) to paying customers.

If you don't have an email autoresponder series set up on your website, this is a must do for your business. And if you've already created one email autoresponder, consider how you can use autoresponders to deliver other content in your business.

Create A Fulfillment System (Membership Area)

Another way to systemize product sales and fulfillment is to create a membership area. This is simply a private website with exclusive content available only to your customers.

Usually, a membership site facilitates communication between the members and encourages camaraderie while leading your clients through a step-by-step training. It

can even be the hub of your online training and allow members to directly ask you questions and receive your input. In exchange for this, members pay a monthly, recurring fee.

When done correctly, a membership site can generate a great source of recurring revenue without requiring you to exchange your time for money.

The most important lesson in this step is to automate as many aspects of your sales and content delivery as possible, whether through funnels or an automated content delivery system.

Complete the worksheet on the following page to help you streamline your sales and product delivery mechanisms.

A great example of one is one of our partner companies using a membership site is **Fitness Online University**.

The screenshot shows the user profile for 'Marquiste' on the Fitness Online University platform. The profile is 100% complete, with sections for Personal Info (3/3), Profile Photo (1/1), and Cover Photo (1/1). The user has 11 followers and 0 following. The profile is currently on the 'Courses' tab, which displays three available courses:

- RevUp Fitness Conference 2021**: 21 Lessons, 0% Complete, Last activity on June 27, 2021.
- Grow Your Email List With Contest...**: 19 Lessons, 0% Complete, Last activity on April 28, 2021.
- RevUp Fitness Conference 2020**: 18 Lessons, 0% Complete, Last activity on January 31, 2021.

The left sidebar shows navigation options and a 'LATEST UPDATES' section with recent posts from other members like Coco-Chanel and Ruby. The top navigation bar includes 'The Hallway', 'Mastermind Recordings', and 'Members'.

Step 4: Automate Content Creation

Step 4 addresses a time intensive, yet important component of your business: content creation.

Successful businesses understand the need to regularly engage with clients, customers, and potential customers. It doesn't matter how you connect. What matters is that you consistently engage with your subscribers and followers.

Every business has its own system and process for developing and creating content.

Examples of content creation for many businesses include the following:

- Writing blog posts, social media updates, and emails
- Creating, shooting, and editing videos
- Recording and sharing podcasts and other audio communication
- Designing graphics for social media posts, blogs, etc.
- Interviewing guests and/or being interviewed
- Developing new products (free or for purchase)

It's not important what type of content you prefer to create. The key is to regularly generate and share content.

The reality, however, is that consistently producing content can be overwhelming and time consuming. The solution?

Automate all content creation.

Creating content helps your business build a relationship with your audience. You can answer their questions and interact with customers. When you create value without taking anything in return, your audience is more likely to trust your advice and recommendations.

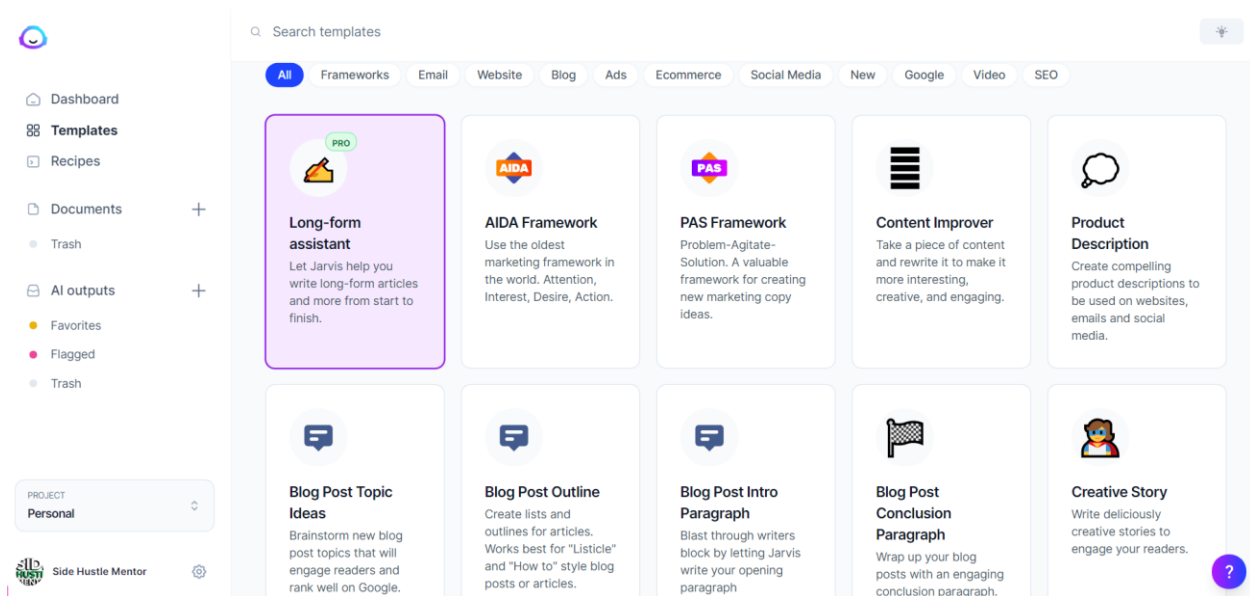
Ultimately, when your content shows up at the right place and the right time with the right audience, it'll improve your brand's reputation. The more quality content customers see, the more likely they are to have a positive association with your company.

However, creating content consistently is not as easy as it sounds. The good news is

that you use online tools to help you write engaging and consistent content faster than ever.

Our personal favorite is a tool called [Jasper.ai](https://jasper.ai).

[Jasper](https://jasper.ai) is Artificial intelligence that makes it fast & easy to create content for your blog, social media, website, and more! Even better, it comes with a [free 5-day trial](https://jasper.ai) so you can test-drive and see how it works for your business.



Using this tool, we have been able to eliminate writers block and crank out high-converting contents in minutes!

Keep in mind, you should also be repurposing existing content.

You don't need to create something original for every single interaction. Many people will miss some posts and you'll always have new followers. You may also want to add broadcast emails to autoresponders or add older products to funnels as upsells or downsells.

The content you create is valuable for years to come. This is why creating quality content is also important. The better content you create, the greater its reach and ability to connect with new readers.

Step 5: Automate Content Promotion

In step 5, you'll learn how to take the stress and hassle out of content promotion.

Once you have awesome content to share with your followers, you have to promote it. It won't do any good parked on your website unless people know it's there.

The best way to promote valuable content consistently and easily is to automate it!

Technology and online tools make automating content and business promotion easy and simple. In this step, we'll discuss two important topics: scheduling content promotion and increasing shares.

Schedule Your Posts

There are many online apps and tools focused on removing the overwhelm of regularly posting on social media websites. A few examples of automated marketing business tools are Meet Edgar, Buffer, and CoSchedule, but our absolutely favorite is Loomly.

[Check my Loomly review here on YouTube:](#)



Loomly Review - Automate Your Social Media Calendar

1.6K views · 2 years ago

 Side Hustle Mentor

Treat your business like a well-oiled machine and #automatethehustle The information contained on this YouTube Channel and ...

These types of software allow you (or your assistant) to schedule social media posts ahead of time. This means you won't have to worry about how you're going to post when you're sick or on vacation. Or if your assistant takes a week off, you're still covered.

Some platforms allow you to upload different categories of content to post, making it easy to reuse content and alternate between different types of posts. For example, you'd have separate folders for quotes, older blogs posts, tips, questions, etc.

Most social media automation software also analyzes the performance of posts across your social media platforms. This can help you see what your readers most respond to, when they prefer seeing your posts, and which sites reach more people.

In addition to social media scheduling, some tools also help businesses plan content creation and collaboration between team members.

For example, Loomly lets you assign tasks, set deadlines, and comment on each task. This makes delegating content creation and marketing tasks super simple and keeps all correspondence on one platform.

The best part of using a social media automation tool is knowing you are consistently connecting with your followers via social media. And of course, you can share additional content whenever you feel like it, knowing your preset schedule will continue to work for you.

The social media tools discussed in this step (and others on the market) vary in pricing and features. If you don't already use an automatic social media posting service or you are considering switching your current one, take a few minutes to review what's available. It's important to research and find the best social media automation tools for your business needs.

Remember: the point is to make social media posting easy for you by automating it!

Use the worksheet on the next page to begin using an automated social media promotion tool.

Step 6: Outsource & Delegate

In step 6, you'll learn how to take the stress and hassle out of finding the right people.

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

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

You may think that outsourcing is a huge hassle because you must 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 well. Outsourcing allows you to present a professional image while making sure each of your essential business functions is cost-effective.

Top Websites for Getting Tasks Outsourced

Before we begin, I wanted to give you these quick resources. Here are some of my favorite websites for finding talent to outsource your tasks to:

[Fiverr.com](https://www.fiverr.com)

[Upwork.com](https://www.upwork.com)

[Freelancer.com](https://www.freelancer.com)

Now let's get into the fun stuff!

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

Step One: Identify Your Outsourcing Task

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

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

- What is the exact goal of the project?
- What problem will it solve?
- Is it an ongoing project or a one-time solution?
- Have you completed the process yourself?
- Can you describe the mistakes that you made during the process?
- Have you hired a freelancer in the past for this kind of project?
- What did you learn from the experience?

Take the time to complete this exercise and be thorough when answering the questions.

This step will help you in identifying any potential problems that might arise between you and the freelancer. Plus, it's an excellent way for you to make sure the project description includes every feature and elements that you need for your freelancer to possess.

Step Two: Write Your Project Description

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

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

- Price
- Feedback rating
- Prior work experience

- Communication skills
- Work samples

Every freelance website is full of talented freelance workers. The trick to getting their attention is to write a compelling project description. It needs to be written in a way that encourages the top-notch freelancers to respond while subtly discouraging the unqualified freelancers. Including the following seven elements in every job description will ensure that the best freelancers will reply to your post.

Element One: Include a Specific Project Title

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

Element Two: List the Required Skills

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

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

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

Element Three: Eliminating Certain Candidates

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

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

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

Element Four: Provide Specific Parameters

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

For instance, you might include the following:

- Specific technical skills required to complete the project
- Any programming languages
- Exact word counts for the project
- The niche market for the product
- Description of the target audience
- Example products and websites
- Links to your current product line
- Elements you like about your competition

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

Element Five: Create a Private Description (Optional)

Sometimes the job you are outsourcing requires a certain level of privacy because you don't want to reveal too much about your business. For these situations, you'll write a vague description informing the candidate that you'll explain more in a follow-up

description for those candidates that are selected. From there, you'll have them sign a non-disclosure agreement before you provide them the rest of the details of the project.

Element Six: Include a Statement About Plagiarism

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

Element Seven: Embed a Code Phrase

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

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

Step Three: Eliminate Unqualified Bids

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

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

Surprisingly, you can eliminate many freelancers with these six rules. Notice that cost

isn't included on this list. Right now, at this point in the process, it's more important to eliminate freelancers who aren't a good fit for the listed project.

Step Four: Pick 3 to 5 Qualified Candidates

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

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

The Bid Price

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

Companies v. Individuals

Pay close attention to the language of the bid. If the proposal includes words like "we" or "us" then it's a good sign that they are representing a company. While you don't have to eliminate companies and agencies automatically, you need to be careful when analyzing their work history to make sure they are worth the increase in cost.

Personalization

Many of the bids that you receive will be a "cut-and-paste" response that shows the project description wasn't thoroughly read. While the bidder may have included the code phrase, they do so in a generic response that lacks any personality and connection. While you are going through the bids, you want to look for freelancers who seem like they are genuinely interested in working on the project. You want to look for freelancers who include comments about how they are uniquely qualified to work on your project and who can relate parts of your description to something they've done in the past.

Project Examples

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

Past Feedback Ratings

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

Timeline

Even the most experienced freelancers can be a waste of money if they can't complete a project on time. Every bid you receive will give you an expected timeline for completion. Pay close attention to the delivery dates submitted and eliminate any proposals that go beyond the norm.

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

Step Five: Pick the Most Qualified Freelancer

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

Create a Small Test

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

- Ask them a question about their bid

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

The purpose is to give each candidate a simple task that shouldn't take more than a few minutes to complete. Give them a couple of days for them to respond. If a candidate gives you excuses or takes too long to complete the task, it's a good indicator that you'll get the same kind of service on your project.

Run a Small Project

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

Look for Interest in the Project

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

Check References

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

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

Following these four action items should help you to find the one candidate that is a perfect fit for your project. At this point, you have to rely on your instincts. If one of the freelancers feel like a better fit than the others, then they are the one that you should

hire. After making the final decision, you'll create a contract and begin working with the freelancer on completing the required task.

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

And that's a wrap...

You made it! Congratulations on going through this ebook.

As you likely already know, many of the highest performing businesses use systems and automation to increase their reach and success. While it can feel scary to hand off important tasks to a computer app or a team member, this is how you leverage your time and expertise.

The six steps in this book addressed many important areas to automate and systemize in your business, including operating procedures, content creation, marketing, sales and fulfillment, customer support, and client onboarding. **No one expects you to implement them all overnight.**

Start with the topic you feel most overwhelmed with in your business and begin making small changes. Continue one step at a time until you have systemized and automated as much as possible!

Like all areas of your business, **systemizing and automating is a process.** Do the best you can right now and continue to improve in the coming years. I know you've got this!

And...I know I know; you may be asking yourself that this all sounds great, but what about the tech?!? It is overwhelming, and I am just NOT a tech person.

We are here to make tech simple, so do not be afraid to book a call, and to finally gain some clarity in your business.

To your success,

Marquiste

