

ONLINE BUSINESS SYSTEMIZATION



GUIDE 3:

Tools for Systemizing Your
Online Business

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If you want to build a successful business that is capable of generating steady, predictable sales, then you need to develop systems that will allow your business to continue to run even when you're not in the office.

If you are feeling stressed by the overwhelming number of tasks, email, projects, clients, and social media marketing that you are tackling on a daily basis, several tools can automate your tasks and free up your time.

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

Asana

Asana (<https://asana.com>), is a tool that helps you move your work forward. It is the easiest way for your team to track their work and get results. Asana can help you free up your email because any conversation that you have with your team happens in the app.

While asana was designed to be used by organizations, individuals running their own business can also benefit from utilizing the tool in their business.

Here are a few highlights that make this an excellent tool if you're trying to systemize your business.

- It splits your "to do" list into actionable tasks based on when those tasks are due, who was allocated to work on the project, and by the project themselves. This feature will allow you to collaborate on larger projects with your team or focus on small, individual tasks.
- It allows you to delegate tasks more efficiently.
- It works with Google Drive and Dropbox, so you can easily share files within the project.
- It's free.

Ontraport

Ontraport (<https://ontraport.com>) is an all-in-one business automation tool that brings together all your business tools, customer information, and data into a single application. It is a true marketing automation system that will allow you to market your business using email, postcards, SMS, and more.

It also has a feature that will enable you to sell your programs, products, and services seamlessly with a payment processing option for PayPal or the merchant provider for your business. Here are just a few of the reasons why Ontraport is a great automation tool for your business.

- It allows you to map your entire customer journey. While most marketing tools show you either how your email performs or how your pages convert, Ontraport shows how your whole business performs on one single campaign map.

- You can see who's converting when, where they are coming from, and their lifetime value through the tools campaign reporting feature. The data you receive can then be tied back to your marketing activity, so you know which campaigns are working.
- It allows you to build your campaign from scratch or choose a campaign from its vast library of turn-key templates that include emails, pre-designed pages, and everything else you need to launch your campaign.

Slack

Slack (<https://slack.com>), is a business tool that allows your team to kick off a project, hire new employees, review a sales contract, finalize your budget, measure and A/B test, and more; all from its easy to use interface.

The program will help you save time when collaborating with your team by providing you a single place for messaging, files, and tools. Here are just some of the features that Slack has to offer your business.

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

Deadline Funnel

Deadline Funnel (<https://deadlinefunnel.com>) is a program that will allow you to sell your programs live through webinars, as well as allowing your customers to enter into mini-launches, which are fully automated, using timers that countdown to the expiration of the cart.

The countdown timers that deadline funnel uses are personalized to each visitor, allowing you to add a sense of urgency to your marketing funnel. With deadline funnel, you can build real, evergreen campaigns that provide each of your subscribers with their own deadline. Here are several reasons why businesses utilize deadline funnel in their companies.

- You can create deadline campaigns for your product launches, with the ability to set the same deadline for everyone.
- It integrates with several powerful business systems including ActiveCampaign, HubSpot, MailChimp, and Ontraport.

Lead Pages

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

- Create mobile friendly templates that seamlessly adapt to your audiences favorite connected devices.

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

Calendly

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

- They have complete control over their schedule. The program allows you to set buffer times between meetings, prevent last-minute meetings, create secret events, and more.
- The program is extremely flexible and supports joint availability meetings, round-robin meetings, and one-on-one meetings.
- It works with all your favorite business apps like Salesforce, GoToMeeting, Zapier, and much more.

GoToWebinar

Webinars have become a massive part of many online businesses.

GoToWebinar (<https://gotomeeting.com>) lets you quickly and more

efficiently communicate with employees, prospects, and customers. It can easily handle large groups of people and turn your presentation into a conversation and the conversation into sales.

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

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

DropBox

With Dropbox (<https://dropbox.com>) business, you can grow your company without limits, while maintaining complete control over your company's sensitive data and other activities. Flexible storage plans and team storage management are just some of the features of the powerful file sharing business tool.

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

Google Docs

Google Docs (<https://docs.google.com>) is a robust document sharing and editing tool that allows team members to work on documents in real time. With immediate syncing capabilities, the program reduces the chances that someone will over-ride someone else's contribution.

Google Docs brings all your business documents to life with smart editing and styling tools that make it easy to format text and paragraphs. Other features include:

- Hundreds of templates that are designed to make your work more professional and your life much more comfortable. With a wide variety of report, resume, and other pre-made documents you can get a head start on all your document creation needs.
- Since Google Docs is a web-based tool, you can get all your documents anytime and from anywhere. You and your entire team can access, create, and edit documents from your favorite devices,

even if there isn't a connection.

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

Google Calendar

Make the most out of your days with Google Calendar

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

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

Webinar Jam

Webinar Jam (<https://webinarjam.com>) offers business owners unmatched flexibility and high-tech precision at a value that can't be matched. With the ability to invite up to six co-presenters Webinar Jammer is one of the best

collaboration tools on the market. The program is compatible with all browsers, operating systems, and devices, making it easy for anyone to attend your webinar.

- Draw and mark up directly on your screen and turn your whiteboard ideas into reality. You can quickly highlight and write annotations on the screen as you run presentations, training, software demos, lectures, or share mind maps.

Screencast-o-Matic

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

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

HootSuite

Do more with your social media with HootSuite (<https://hootsuite.com>).

HootSuite is dedicated to not only enhancing your social media engagement but helping you automate it across more than 35 global networks like Twitter and Facebook. It identifies the social media influences in your industry and automates social media strategies for you.

- Save valuable time by scheduling all your social posts through an easy to use interface. Keep your business's social presence active around the clock by automatically scheduling hundreds of social media posts at once.
- Track and prove your social return on investment (ROI) with the programs social analytics feature. Quickly measure the impact of your social media campaigns with comprehensive reporting. Measure each social channel's conversion rates and separate ROI between paid and owned media.

Infusionsoft

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

- Get more organized with Infusionsoft. All of your customer information is gathered in one place, which allows you to review all of

your previous customer interactions quickly. The simple dashboards and reports show you exactly how your audience is responding to your campaigns.

- Get more customers by creating follow-up email campaigns that are targeted to your customers.
- The marketing automation feature allows you to work leads down the sales funnel and build a sales pipeline that works. With easy to read analytics you can quickly see what's working and what's not.

MailChimp

MailChimp's (<https://mailchimp.com>) primary focus is on email marketing and is one of the most affordable automation tools on the market. Its marketing automation features allow you to target customers based on specific data. Create customer workflows with scheduling and segmentation tools with their application program interfaces (API), and it easily integrates with numerous Web technologies.

- Connect your store to one of the hundreds of e-commerce integrations offered by MailChimp to create targeted email and ad campaigns.
- The robust marketing automation in Mailchimp ensures that your emails are getting in front of the right people at the right time. It allows you to target customers based on preferences, behavior, and previous sales.

- Reach a wider audience with Facebook, Google, and Instagram ads to grow your bottom line in fewer steps.

Needls

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

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

Salesforce

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

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

IFTTT

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

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

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