# SUPER EFFICIENT

# SYSTEMS FOR EVERY BUSINESS

*A guide to incorporating efficient systems into your business*

BY SARAH MACGREGOR

# Super Efficient Systems for Every Business

A guide to incorporating efficient systems into your business

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# Introduction

## Have you been avoiding areas of your business because the tasks just seem too daunting?

## Want to grow your business but can't find the time?

## Never fear!  SMac To The Rescue is here!

Gosh, I just love saying that - I feel like I can tackle anything when I use my Superhero voice!

SMac to The Rescue is Your Super Efficiency Expert - in this e-book you'll find some excellent information and examples to help you understand how systems can help your business run smoothly and efficiently, how to create systems of your own, and as a result help your business to grow.

Enjoy!

# Systems - What the heck are they and why do I need them anyways?

## What the heck is a system?

Here's one definition: "an ordered and comprehensive assemblage of methods. Also known as an *organizational scheme* or a *procedure*."

I don't know about you, but "organizational scheme" brings to mind a super villain with an evil laugh gleefully twisting his hands together! As fun as "scheming" sounds, the reality is not complicated at all - basically what the above definition is saying is that a system is a documented, detailed flow of tasks that you, or anyone else, can follow.

## Why do I need systems in my business?

You not only need systems in order to grow your business, you need systems in order to simply stay afloat in your business! When faced with any given task that our business may throw in our path, we should have a system to tell us what to do.

If you ***don't*** have systems in place for your business, here is what will happen:

- you'll handle a situation differently every time therefore wasting your time and reinventing the wheel
- you will inevitably lose important information somewhere along the line
- if you get sick, have a family emergency, or want to take a holiday you don't have any way for someone to step in and keep the business running smoothly in your absence

But if you ***do*** have systems in place, there are so many benefits:

- *with systems* your business becomes more automated, streamlined, and efficient, therefore freeing up your valuable time
- *with systems* no information ever falls through the cracks
- *with systems*, in the event of an emergency, illness, or taking a holiday all you have to do is hand over your systems to whomever is filling in for you and they should be able to see exactly what needs to be done and when
- *with systems* you'll have more time to spend working *on* your business instead of *in* it

# Different types of systems

Let's go over a few different types of systems that can be utilized in almost every kind of business.

## 1. Customer Service Systems

Most likely these will be the first ones you focus on simply because without customers we don't have a business! Here are some examples of some Customer Service Systems that you should create:

- Handling Prospects
- Handling Sales
- What to do Post-Sales

## 2. Backoffice Systems

These are all the things that would be considered non-billable tasks (tasks you don't get paid for) that you need to do in order to keep your business running smoothly. Here are some examples of some Backoffice Systems you should consider creating:

- Creating/Procuring Products
- Bookkeeping

## 3. Marketing Systems

If you don't get your business our there then it will take a long, long time to grow it. Have a plan and stick to it, even if you don't see results right away. Here are some examples of Marketing Systems that you could utilize:

- Creating/Updating Website
- Creating/Maintaining Blog
- Utilizing Social Media
- Local Advertising
- Networking
- Utilizing Email Campaigns

# Examples ~ Customer Service Systems

Here are some examples of some customer service systems that SMac To The Rescue has helped to create for a small dance studio. This studio was using a local email client (eg. Outlook), they already had a website and a blog, but they were not using a shopping cart or automatic autoresponders.

## 1. Prospects - what happens when a customer makes contact?

a. Respond to the prospect via email using the appropriate email signature

*Email response to request for more info about classes:*

Hi <insert name here>,

Thanks for contacting me! I would love to have you in my beginner's class; have you ever done any dancing before? It's loads of fun and good exercise too.

The classes run for 10 weeks and each class is an hour and a half, and the cost is $100 for the whole 10 weeks.

Beginner classes are on Tuesday or Thursday nights from 6:30 – 8:00 pm or Wednesday afternoons from 1:30 – 3:00 pm; and Intermediate classes are on Thursday nights from 8:00 – 9:30 pm. All classes will be starting on the week of January 18th, 2010.

If you'd like to register and secure your space in the class please fill out the attached registration form (if you're registering for the beginner classes please remember to tell me which day you're registering for), and then you can either make a cheque out to me and send them both to the studio at:

<studio address>

or, if you'd prefer I can email you a PayPal invoice so that you can pay with your credit card and you can just bring your registration form along with you to the first class. If you decide to use the mail, make sure to let me know it's on its way so that I don't inadvertently fill up the class while your registration is in transit!

*Email response cont'd:*

Here's a map of the studio too, just to make it easier for you to see where it's located: url to map here

If you have any more questions please don't hesitate to ask!

I hope to see you soon...

P.S. I'd love to hear how you found out about my classes

<logo>
<usual signature>

**SUPER EFFICIENCY TIP:**

If you find yourself sending the same email over and over again, or if you anticipate doing so, make yourself a quick template by creating an email signature that contains the entire body of your email *including* your usual email signature at the bottom. When it comes time to use the template simply choose that signature and fill in the blanks!

b. Add the prospect's name and information to the prospect spreadsheet
    i. keep track of important information such as:
        a) name
        b) the date they first contacted you
        c) what they are interested in
        d) how they heard about you
        e) what your next move should be
        f) any other notes you want to remember

c. Add the prospect's email address to your Contacts and include in the Prospects email group so that they will receive the email series sent to all Prospects:

   i. early bird prices - 2 weeks before pricing ends
   ii. last chance for early bird prices - 1 week before pricing ends
   iii. early bird pricing is ended / registration cut-off date - day after early bird pricing ends
   iv. last chance registration - 1 week before registration cut-off date
   v. any new product, event, or upcoming class announcements

d. Set a reminder in the calendar to follow up with a personal email if you don't hear back from them within one week

**SUPER EFFICIENCY TIP:**

Consider signing up for an autoresponder system like **Aweber**, or even a shopping cart system like **1ShoppingCart** so that you can easily manage your contacts and send your entire follow-up email series and product announcements via autoresponder automatically!

2. **Sales - what do we do when a customer registers for a class?**

    a. Make a receipt using a template

    b. Send confirmation email using the appropriate email signature with receipt attached

    c. Move their email contact from the Prospects group to the appropriate Class group (one group for each class)

    d. Make a note in the Prospects spreadsheet saying that they registered
        i. this is for marketing analysis purposes
        ii. in the studio's example each prospect that became a client was highlighted in the spreadsheet so that we could see at a glance how each of these new clients heard of the dance studio, and therefore which advertising methods were successful
        iii. when it's time for marketing again we can make sure to keep using only those advertising methods that have been successful

**SUPER EFFICIENCY TIP:**

It's good business practice to keep track of how prospects found out about you - this will help you to analyze which advertising tactics are actually reaching your prospective customers, and you can focus your marketing efforts in those specific areas next time!

3. **Post-Sales - what do we do when the product has been delivered? (In this example, when the class is finished)**

    a. Send a thank-you email using the appropriate email signature

    b. Send a performance review/survey

**SUPER EFFICIENCY TIP:**

Utilize free online survey programs such as **Survey Monkey** to gather your responses online - you'll be sure to receive far more responses if your customers don't have to remember to mail your survey back to you!

From these examples you can see how systems can be very detailed, or they can be very simple steps to help you remember the flow of events. And, it also shows that no matter how small (or how big for that matter) your business is, systems are still necessary if you want to be efficient.

**SUPER EFFICIENCY TIP:**

Here's how a Virtual Assistant can help with customer service systems:

- We can manage your email and contacts by setting up a contact management system, autoresponders, and/or a shopping cart
- We can send emails on your behalf as your "assistant"
- We can create and send receipts
- We can create and send out surveys, and compile the results for your review

# Examples ~ Marketing Systems

To follow the same example of the small dance studio, here is an example of a marketing system used for new workshops being offered.

1. **Website Updates - what needs to be added/updated?**
    a. Add workshop to events calendar on website
    b. Add workshop to list of upcoming events page on website
    c. Add Register Now button from PayPal

2. **Blog Updates**
    a. Create a blog post announcing the event
    b. Create a blog post reminding of the event date
    c. Create a blog post final reminder of event date
    d. If the workshop fills up, create a blog post to notify that the event is sold out
    e. Create a blog post talking about the success of the event and announcing new product (see #6 below)

3. **Media - posters and advertisements for both print and online**
    a. Create poster for local distribution
    b. Create ads for local print
        i. Confirm ad sizes and specifications
    c. Write press release announcing event

4. **Advertising**

    a. Send ads to local print publications

    b. Distribute posters locally

    c. Post to online event listings (craigslist, kijiji, other local listings)

    d. Check up on local posters - repost where necessary (if the originals are damaged or missing)

    e. Submit press release online

5. **Create an Email Campaign - keep in touch with your list**

    a. Create an email signature to send the workshop details to those who sign up online

    b. Send email to prospects announcing the event

    c. Send email to prospects reminding of the event date

    d. Send email to prospects final reminder of event date

    e. If the workshop fills up, send an email to prospects to notify that the event is sold out

    f. Send an email to all attendees reminding them of the workshop details

    g. Send a follow-up thank you email to all attendees

    h. Send an email to prospects and all attendees talking about the success of the event and announcing the new product (see #6 below)

6. **Create a New Product from the Event**

   a. Edit the audio/video

   b. Create the cover art

   c. Create the finished product, ready for sale

   d. Start a new marketing process for this new product, even if the product is not completed yet

**SUPER EFFICIENCY TIP:**

Here's how a Virtual Assistant can help with marketing systems:

- We can create/update your website
- We can create/update your blog
- We can do desktop publishing to create professional marketing materials
- We can help you write press releases
- We can submit events and press releases online
- We can manage your entire autoresponder email system
- We can edit audios and videos

# How do I create my own systems?

Now that you've seen some examples you're ready to start creating your own systems.

There are two different ways you can do this: on your own using Six Super Simple Steps or with the help of a Virtual Assistant.

## 1. Create a system using Six Super Simple Steps

Let's recreate the Marketing Workshops system as we go along so you can see what each step looks like.

### Step #1: Choose a system to create

- only work on one system at a time so you don't get overwhelmed

### Step #2: Make a list

- make a quick list of everything you can think of that you want to do to market your workshops
- keep it simple and don't go into any detail yet

| | |
|---|---|
| 1 | **Add to website** |
| 2 | **Talk about it on the blog** |
| 3 | **Create posters** |
| 4 | **Advertise both locally and online** |
| 5 | **Use email to tell everyone about it and keep them updated** |
| 6 | **Create new product from the event** |

### Step #3: Add tasks to your list

- for each item you've got in your list, name each task that you want to perform
- don't go into any detail on how to do each task yet

| | | |
|---|---|---|
| 1 | Website | |
| | | **add to events calendar** |
| | | **add to upcoming events page** |
| | | **add Register Now button from PayPal** |
| 2 | Blog | |
| | | **announce the event** |
| | | **remind of the event date** |
| | | **final reminder of the event date** |
| | | **notify if the workshop fills up** |
| | | **announce the success of the workshop and new product as a result** |
| 3 | Posters/Media | |
| | | **create posters/flyers for local distribution** |
| | | **create ads for local print publications** |
| | | **write a press release announcing the event** |
| 4 | Advertise | |
| | | **send ads to local print publications** |
| | | **distribute posters locally** |
| | | **post to online event listings (craigslist, etc.)** |
| | | **check up on local posters and repost if necessary** |
| | | **submit press release online** |
| 5 | Email | |
| | | **create new email signature to send workshop details** |
| | | **send email to prospects announcing the event** |

| | | |
|---|---|---|
| 5 | Email cont'd | |
| | | **send email to prospects reminding of the event date** |
| | | **send email to prospects final reminder of event date** |
| | | **if workshop fills up, send email to prospects to notify** |
| | | **send email to attendees reminding them of workshop details** |
| | | **send follow-up thank you to all attendees** |
| | | **send email to prospects and all attendees talking about the success of the event and announcing new product** |
| 6 | Product | |
| | | **edit the audio/video** |
| | | **create the cover art** |
| | | **create the finished product** |
| | | **start a new marketing process for this new product** |

### Step #4: Define your time frames

- look at each point in your list and decide when this task should happen (eg. 1 week prior to event, 2 days after event, etc.)

| | | | |
|---|---|---|---|
| 1 | Website | | |
| | | add to events calendar | **immediately** |
| | | add to upcoming events page | **immediately** |
| | | add Register Now button from PayPal | **immediately** |
| 2 | Blog | | |
| | | announce the event | **immediately** |
| | | remind of the event date | **2 weeks prior** |
| | | final reminder of the event date | **3 days prior** |
| | | notify if the workshop fills up | **ongoing** |
| | | announce the success of the workshop and new product as a result | **2 days after** |
| 3 | Posters/ Media | | |
| | | create posters/flyers for local distribution | **immediately** |
| | | create ads for local print publications | **immediately** |
| | | write a press release announcing the event | **immediately** |
| 4 | Advertise | | |
| | | send ads to local print publications | **1 month prior** |
| | | distribute posters locally | **1 month prior** |
| | | post to online event listings (craigslist, etc.) | **1 month prior** |
| | | check up on local posters and repost if necessary | **ongoing** |
| | | submit press release online | **1 month prior** |
| 5 | Email | | |
| | | create new email signature to send workshop details | **immediately** |
| | | send email to prospects announcing the event | **immediately** |

| | | | |
|---|---|---|---|
| 5 | Email cont'd | | |
| | | send email to prospects reminding of the event date | **2 weeks prior** |
| | | send email to prospects final reminder of event date | **3 days prior** |
| | | if workshop fills up, send email to prospects to notify | **ongoing** |
| | | send email to attendees reminding them of workshop details | **1 day prior** |
| | | send follow-up thank you to all attendees | **1 day after** |
| | | send email to prospects and all attendees talking about the success of the event and announcing new product | **2 days after** |
| 6 | Product | | |
| | | edit the audio/video | **asap after** |
| | | create the cover art | **asap after** |
| | | create the finished product | **max 1 week after** |
| | | start a new marketing process for this new product | **2 days after** |

**Step #5: Sort your list into chronological order**

- this will make it clear which tasks need be done first

| | |
|---|---|
| add to events calendar on website | **immediately** |
| add to upcoming events page on website | **immediately** |
| add Register Now button from PayPal to website | **immediately** |
| write a blog post to announce the event | **immediately** |
| create posters/flyers for local distribution | **immediately** |
| create ads for local print publications | **immediately** |
| write a press release announcing the event | **immediately** |
| create new email signature to send workshop details | **immediately** |
| send email to prospects announcing the event | **immediately** |
| check up on local posters and repost if necessary | **ongoing** |
| if the workshop fills up, write a blog post to notify everyone | **ongoing** |
| if workshop fills up, send email to prospects to notify | **ongoing** |
| send ads to local print publications | **1 month prior** |
| distribute posters locally | **1 month prior** |
| post to online event listings (craigslist, etc.) | **1 month prior** |
| submit press release online | **1 month prior** |
| write a blog post to remind of the event date | **2 weeks prior** |
| send email to prospects reminding of the event date | **2 weeks prior** |
| send email to prospects final reminder of event date | **3 days prior** |
| write a blog post for the final reminder of the event date | **3 days prior** |
| send email to attendees reminding them of workshop details | **1 day prior** |
| send follow-up thank you email to all attendees | **1 day after** |
| send email to prospects and all attendees talking about the success of the event and announcing new product | **2 days after** |
| write a blog post to announce the success of the workshop and new product | **2 days after** |

**SUPER EFFICIENCY TIP:**

Sometimes utilizing sequentially ordered checklists can be very helpful, especially if the system spans a larger amount of time. That way, at any given time you can see at a glance what point you have reached in your system. Easy!

| Task | Timing | |
|---|---|---|
| Add workshop to events calendar on the website | asap | ☑ |
| Add workshop to upcoming events page on website | asap | ☑ |
| Create autoresponder for registration details | asap | ☑ |
| Email - announce event to prospects | asap | ☑ |
| Add a shopping cart button | asap | ☑ |
| Create a blog post announcing the event | asap | ☑ |
| Create poster | asap | ☑ |
| Create ads for print **confirm size & specs | asap | ☑ |
| Write press release | asap | ☑ |
| Send ads to magazines & newspapers | 1 month prior | ☑ |
| Distribute posters around town | 1 month prior | ☑ |
| Post to online event listings: | 1 month prior | ☑ |
| Submit press release online | 1 month prior | ☑ |
| Blog - reminder of event date | 2 weeks prior | ☑ |
| Email - remind event date to prospects | 2 weeks prior | ☑ |
| Blog - final reminder of event date | 3 days prior | ☐ |
| Email - final reminder to prospects | 3 days prior | ☐ |
| Email - reminder to attendees | 1 day prior | ☐ |
| Email - thank you for attendees & new product announcement | 1 day after | ☐ |
| Blog - success and new product | 2 days after | ☐ |
| Email - success and new product | 2 days after | ☐ |
| Check local posters | ongoing | ☐ |
| Blog - if event fills up, notify sold out | ongoing | ☐ |
| Email - if event fills up, notify prospects that it's sold out | ongoing | ☐ |
| Edit audio/video | asap after | ☐ |
| Create cover art for new product | asap after | ☐ |
| Create finished product for resale | max 1 week after | ☐ |
| Start a new marketing process for this new product | 2 days after | ☐ |

**Step #6: Add reminders to your calendar**

- set up automatic reminders in your calendar
- print off a calendar and write down all your tasks on the appropriate dates
- set up automatic reminders in your mobile device
- whatever works best for you so that you won't forget to do the tasks within the timeframe that you have set for yourself

## Ta da! A brand new Super Efficient System in Six Simple Steps!

**Choose a system**
**Make a list**
**Add tasks**
**Add timeframes**
**Sort chronologically**
**Set reminders**

**It's really that easy!**

All you have to do now is start using your new system! It's a great idea to keep your systems handy - hang the most-used ones on your office wall; print them off and create a systems binder for your business; keep them on your desktop in a Systems folder - whatever works best for you. If your systems are easy to get to, you will be more likely to use them consistently, and your reminders will help to keep you on track.

Remember that you can add as little or as much detail as you want for each task. For example, you could create detailed instructions on how to add something to the events calendar on your website that could include login information and step-by-step instructions - this would ensure that pretty much anyone could step in and follow your system to get the task done. Whatever you are the most comfortable with is what will work best for you.

Once you start using your system you'll probably discover small details that need to be tweaked here and there, or gaps that need to be filled in - don't worry, this is completely normal! Systems are constantly evolving and should be updated regularly.

## 2. Create systems with the help of a Virtual Assistant

Creating systems for your own business can still seem daunting, and here is where your Virtual Assistant can come in to save the day: the simple act of beginning to work with a VA will end up creating systems by default! Through the process of determining what your VA will be doing for you and your business, you'll be fleshing out and creating systems. Easy!

SMac To The Rescue also offers consultations and coaching to help you review and define efficient systems, break everything into small, manageable pieces, and get you and your business un-stuck and back into action.

And, we have ready-made service packages that will suit all your business needs, and will effectively take many tasks off your plate and free up your time. Perfect!

**A Virtual Assistant's job is to create and implement systems for you so that you can spend time doing what you <u>should</u> be doing:**

**Making money and growing your business!**

# Conclusion

You're ready to roll!  Efficient systems are simple to create and use, and now is the time to make your own business more efficient and streamlined.

Remember, systems are not a luxury.  **If you want to have a successful and thriving business that continues to grow, *you need systems in place!***

Hang on to this book as you create your own systems, you never know when you'll need to check back and be reminded of some of the examples that are listed here.

I wish you the best of luck, and every success!

# About the Author

Sarah MacGregor (a.k.a. “SMac”) officially started out as a Virtual Assistant (VA) in 2007. After careful planning SMac To The Rescue started off with a bang and it just keeps growing, having now evolved into a Multi-VA practice.

SMac quickly realized that some things that seemed like common sense to her were in fact a real struggle for other business owners, and she naturally fell into the role of breaking down projects into manageable pieces, coaching business owners on how to become more efficient, and coming to the rescue of every solopreneur that crosses her path!

SMac has been a teacher/trainer in many different capacities over the years, she’s insanely organized, and she gets excited every time she’s faced with a new situation where her organization and efficiency can be put into action! She’s a software developer to boot so you can rest assured that she is truly a techno-geek.

SMac

**Sarah MacGregor a.k.a. “SMac”**
CEO, SMac To The Rescue!
Your Super Efficiency Expert!

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