

WordPress Business Toolkit





Things work out best for those
who make the best of how
things work out.

John Wooden

Getting Started

Create a legitimate business and build a brand that helps create solutions and help your customers to **earn money** while you do too!



BUSINESS FORMATION

Sole Proprietor
S Corporation
C Corporation
LLC

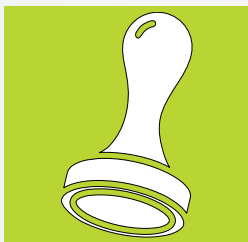
ACCORDING TO THE IRS:

“payer has the right to control or direct only the result of the work and not what will be done and how it will be done”

But even an independent contractor needs to form a legitimate business.

Legal Issues

Don't forget about the legal issues of forming your business



**Business
License**



EIN



**Local
Permits**



**Copyright
Trademark**

Don't mix personal & business finances



Do not pay personal expenses with business funds and do not pay business expenses with personal funds. Consult with a financial professional to organize your finances.

Financial Information

Don't forget to keep accurate records and track expenses for **tax purposes**.



Consult with a financial professional.



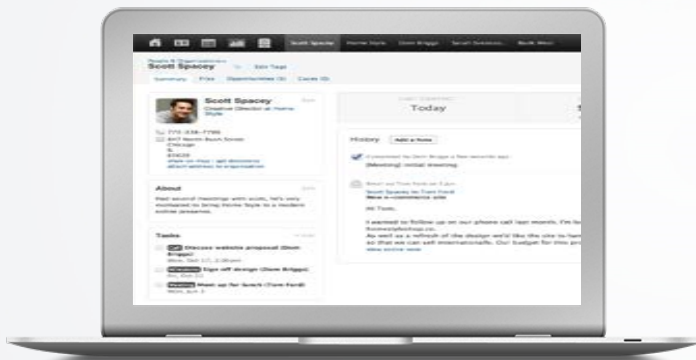
CRM
CUSTOMERS

POA
PLAN OF ACTION

SECURITY
SYSTEMS

CRM

Use a CRM for lead capture, project management, collaboration and more.



Customer relationship management (CRM) is a model for managing a company's interactions with current and future customers. It involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support.



Social Media



Collaboration



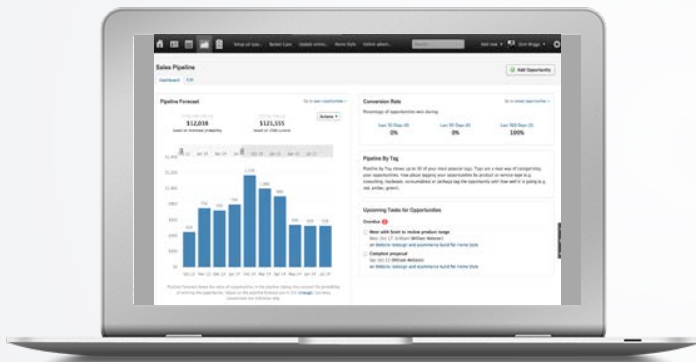
Email



Sales Pipeline

POA

Have a plan of action from business development to marketing to execution.



Customer relationship management (CRM) can help you follow a POA through a sales pipeline



Tasks



Collaboration



Email



Sales Pipeline

SECURITY

Secure your documents and control access.
Monitor and update access regularly.



Create an intranet in **WordPress** and use secure Passwords. Monitor access.



Secure files



Monitor access



Define roles



Passwords

Track, Learn and Report

Regardless of client and project, track time and measure progress to **earn money**



Automatically track the effectiveness of your work and self-optimize each interaction. The results will help you determine billing as well as value.

Time Tracking

Tracking your time can help you understand what you should charge.

MARKETING

Time spent networking and marketing to increase business

EDUCATION

Time spent learning new skills to offer more services and increased value to clients

HOURS

How much time you actually work vs. income needed will help you determine rate.

CALLS

Troubleshooting calls with client vs. scope creep to prepare more accurate proposals.

TIME ANALYSIS

What are you doing all day?

RESEARCH

Researching options for clients to save them money, but actually costing you time.

ACCOUNTING

Invoicing and collection calls for overdue invoices can accumulate

SOCIAL MEDIA

Leveraging technology to help you increase your visibility and share information

FREE

Time spent speaking for free, “coffee” and just a quick question – how much are you actually spending on this.

Customer Service



Your customer doesn't care how much you know until they know how much you care.

~ Damon Richards

Create personal accountabilities |
Monitor your online reputation | Set business hours
| Respect your customer's time | Request feedback

The Do's

Here is what you need to focus on when it comes to customer service.



Run your business, don't let it run you! Schedule your tasks – even if you do them late at night – with tools that create “official business hours”, measure your performance to understand how long tasks really take, always plan prospect time to find new clients, and follow up on **everything**.



Schedule tasks



Measure performance



Plan prospect time



Follow up, follow up

The don'ts

IGNORE CLIENTS

Always follow-up

ACT DUMB

Especially on social media, mind your comments

WORK IN PJ'S

Be prepared for client calls - ALWAYS

Regardless of where you are working, you are
running a business. Act the part.

Proposals and Contracts

Understand what should be in the contract, and what might be an a la carte item.

GOALS & OBJECTIVES

Be specific to client requests.



SCOPE

Be VERY specific, or your Project can quickly get out of control.

TERMS

Be specific about time, Budget and responsibilities.



Beyond the Project

Understand the value of your project and how to continue to earn money after delivery.



THIS IS THE PROJECT NAME

Ongoing support programs can offer revenue streams and good customer service

- ▶ Site Management Plan
- ▶ Video Training
- ▶ Reference Manual

Contact Us



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