



Business Systems Can Transform How You Work.

HERE'S HOW.



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While establishing business systems may not seem like a high priority when things are running smoothly, the reality is that breakdowns in your processes can cost you both time and money.

Here are some ideas on which areas of your business to focus on for creating efficiencies.

Before You Begin

Before you dive into creating or updating business systems, it's a good idea to take a step back and do a full assessment of all the areas of your business that potentially need processes in place. I like to start with creating a customer service manual — because this impacts your business internally and externally.

Any business will have some frequently asked questions, along with common customer service related tasks that may come up, including:

- Refund requests
- Discounts
- Scheduling
- Delivery of items
- Client responsibilities
- Timeline



Other areas of your business that may under the category of internal processes needing review could include:

- Deliverables and deadlines
- Expense management
- Email management
- Customer testimonials
- Content creation
- Vacations and time off
- Marketing activities
- Invoicing
- Onboarding



Consistent Content Creation

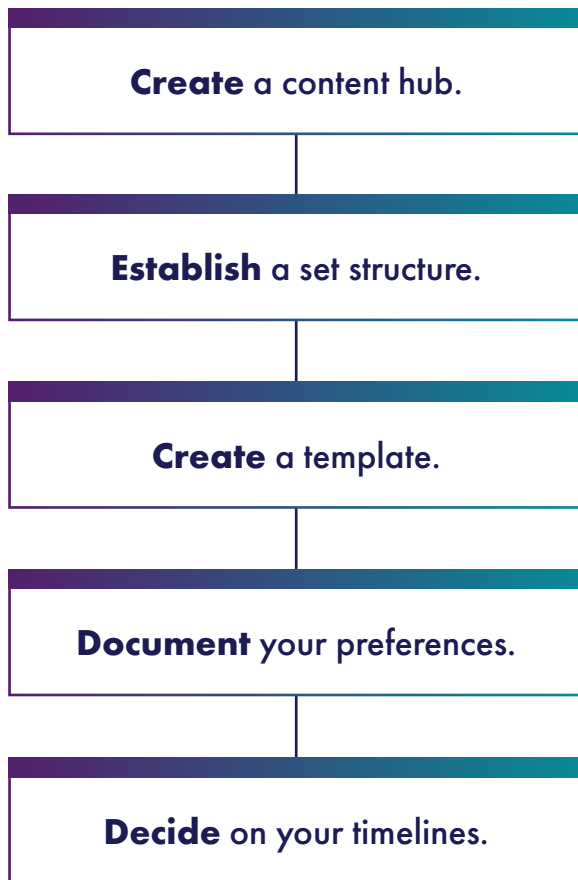
I recommend creating your editorial calendar on a quarterly basis, as that enables you to avoid the scramble of deciding monthly or weekly what content you need to create.

Along with your editorial calendar, you should also document processes for preparing and creating your content including:

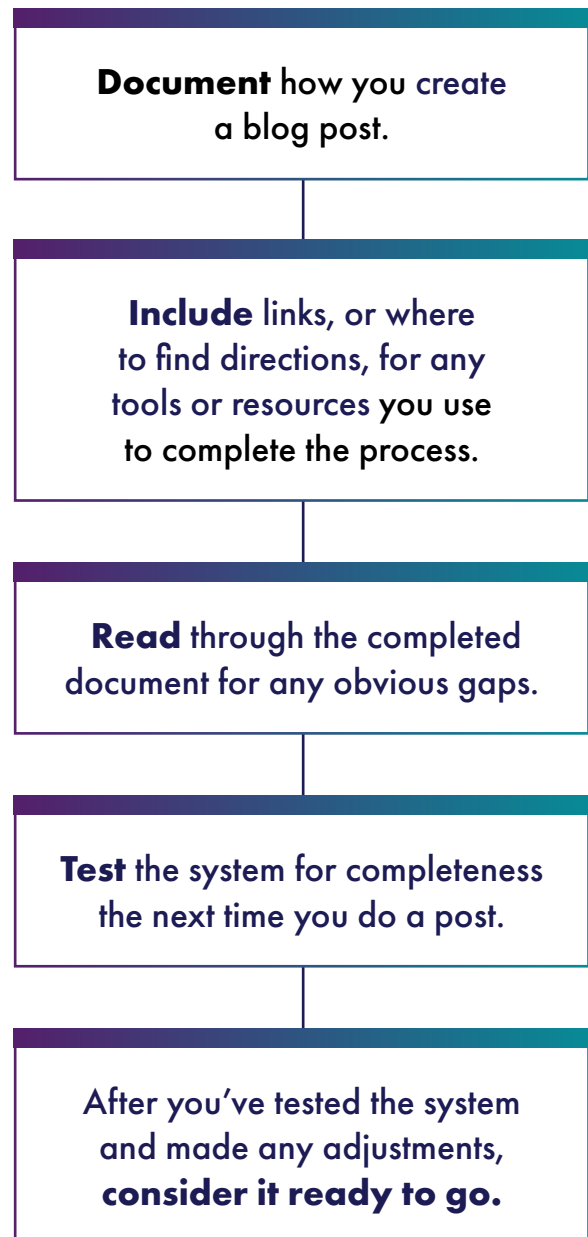
- Who's responsible for which pieces of content?
- What are the timelines for each type of content?
- Who reviews the content and approves it?
- Where's the content housed?
- What are your writing guidelines for each content type? This includes preferred styles, fonts, word choices and more.



To create a newsletter system:



To create a blog post system:



Handling Your Money

As your business grows, the money you'll need to be managing for your business will also grow. And if there's one place in your biz you want things to be airtight, it's your money!

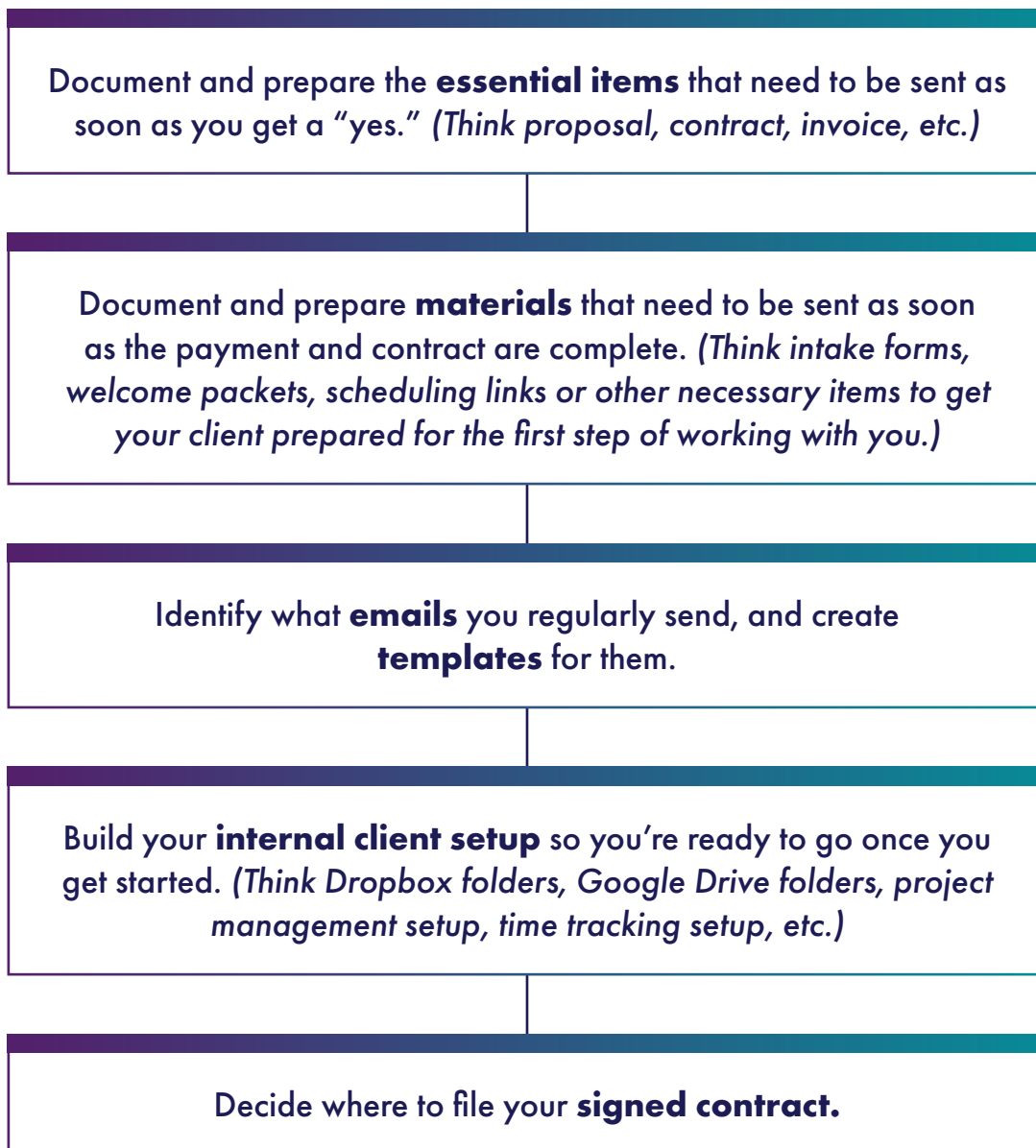
Business systems related to your money generally fall into one of four categories and each one should have some processes in place:

- **Billing:** Whether you're offering services or products, you need a consistent way to invoice your clients/customers.
- **Receipts:** Having a business system for receipts is essential if you want to minimize stress and headaches when tax time rolls around.
- **Expenses:** Knowing exactly how much money is needed to run your business each month is essential. Many of your expenses will be automated charges with varying frequency, so documenting them all in one place helps keep them corralled.
- **Bookkeeping:** With regular bookkeeping, you can ensure you're managing your money and keeping the proper attention on the financial health of the business regularly. I'm a big proponent of outsourcing this to an expert.

Upleveling Your Customer Experience

Customer experience can make or break your business, so having a few business systems in place that enhance their experience and make doing business with you easier are a must.

Build your client onboarding system:



When setting up a system for customer service emails, consider the following:

- Is it worth the time investment to train certain staff on systems they won't ever use except to answer occasional questions?
- If you do train them, will they have enough knowledge to understand all of the system triggers? Is it realistic that they'll be able to learn and remember that when you do A then B, C and D happen, which then affects E and F?



Bonus: Sorting Out Your Household

While an aspect of my role as an OBM is to focus on business systems, I am someone who firmly believes that systems can help you both at work and at home.



My four tips for improving your household systems are:

1 NAIL DOWN YOUR MORNING ROUTINE

Mornings can be complete chaos, so consider what you can do to minimize the stress. For example, pack lunches and set out clothes the night before so nobody is scrambling.

2 SCHEDULE YOUR LAUNDRY & OTHER DREADED CHORES

It can be tough to get motivated to do things we dread, so consider putting them into your schedule so you don't have to think about it and just check them off your to-do list without much fuss.

3 USE A 7 MINUTE TIMER

Seven minutes is a small, manageable amount of time but with focused effort, you can make a big difference in these increments. Choose one thing to tackle during your seven minutes — clean your office, throw in some laundry or prep for dinner.

4 OUTSOURCE WHAT YOU CAN

It's all too easy to get caught in the trap of thinking we can handle everything. The reality of running a business is that if you want to grow and scale, something's got to give. Consider what things at home you can outsource — cleaning, meal prep and more!

Build Your Business Systems One at a Time

For those of you thinking about how to get started with your business systems, I recommend not just jumping in without a plan. Prioritize the areas of your business in terms of what will be most impacted by having strong business, and then work from there.

Consider creating monthly or quarterly goals for what you want to accomplish, and don't forget to include your team in the discussion.

By taking the time to create business systems, you'll have the space to grow your business while still offering your clients an exceptional customer experience.

Online Business Manager and Mistress of All the Moving Parts



I'm Tressa and I'm an Online Business Manager (OBM) and my clients are creative women entrepreneurs just like you. As an OBM, I'm a project manager, back-office coordinator, and a people wrangler who knows product development and online marketing inside and out.

I've helped create and manage flagship products that have brought in over \$500,000 in profit in under two years. I've also supported various launches that have brought in over \$95,000. I've helped plan and execute destination retreats that sold out in a matter of hours and brought in tens of thousands in profit.

We work with only a handful of clients at any given time so to ensure that you receive our undivided time and attention, spaces for ongoing support are limited.

Ready to Get Started?

Great, I've got you covered. The first step is to fill out my OBM Client Questionnaire so I can see if we're the right team to support you.

After that, you'll receive an email to schedule your complimentary consultation. You can generally schedule a call within a few days to a week. Typically, these calls generally last between 30-45 minutes and we'll chat about your needs and how I can help.

Packages start at \$2000/mo.

APPLY FOR A DISCOVERY CALL HERE