



Introduction: Automate Your Operations to Work Smarter, Not Harder

In this course, we will focus on how to create systems in your business by taking the tasks you're already doing and turning them into a process. Some of the modules will help you identify areas in your business that can be done more efficiently, while others will help you create solutions that work for you. This course does not recommend any particular products, however, it will teach you how to search for and evaluate products and solutions for your business.

About Our Courses

Each module includes a content video, examples of how our sample businesses applied the concepts, and an activity helping you apply the idea to your own business. We've included PDF, Google Doc, and Google Forms versions of each activity so that you can fill them out on a computer, from your phone, or print them out and fill them out by hand.

Note: While you do need a Google account to open the documents, you do not need a google account to fill out the forms. The PDFs can be opened on any phone, tablet or computer. If you don't have a printer, many local libraries will let you print a few pages for free, whether or not you have a library card.

If you're learning on the go, all videos can be downloaded to your phone, tablet or computer for watching offline. The transcript and audio files for each video are also included at the end of the modules so you can learn in whatever way works best for you and your schedule. In addition, all videos are kept to ten minutes or less so you can fit them into your schedule easily. You can turn on closed captioning or adjust the speed of your video in the settings.

Why Use Systems?

Your business cannot function the same way with three people as it did with one person. Nor can it function the same with nine people as it once did with three people. Every time your business triples in size, you need to update your operational procedures to reflect that change.

Automation is one way you can ease the transition from one person to three people. If you have three people who are all entering information manually, you need to make sure they are all doing it the same every single time.

Benefits to automation:

- Saves you time
- Saves you money
- Leaves less room for error

- Boosts revenue and,
- Allows more time for things that can't be automated

Things to Consider

When looking at building automatic systems in your business, consider what tasks you are spending the most amount of time on. This could be:

- Responding to leads
- Setting up social media posts
- Writing email newsletters
- Answering client questions or
- Going over project logistics

If you have staff, include them in the planning process. They will know what the biggest pain points are because they are experiencing them first hand. These are often the most frustrating because you know there's a better way to do it, but you just haven't implemented it or aren't sure how.

What is Business Automation?

Business automation is how you streamline certain tasks so that you can do them more easily. This leaves more time to focus on individual projects or sales.

Questions we will cover:

- How can you get your email template to send automatically when you send out an invoice?
- How can you set payment reminders to automatically send once you have sent the invoice to the client?
- How do you auto-publish your social media or newsletters?
- How can you automatically send responses to the same questions?
- How can you decrease the amount of time you spend in your business doing the same thing over and over again?

Modules

Now that we have covered expectations and anticipating client questions, let's go over each module and what they'll include.

- Module 1: Identifying Your Process
 - In this section, we use your client communication tasks to begin building a client communication system. This will allow you to see your order of operations with initial leads, estimates, tracking projects, and invoicing. Once we have those written down, it will serve as the example system for this course.

- Module 2: Building a System
 - In this module, we will discuss the pain points in your business, what client expectations are, and expand on your lists from Module 1. We will use your lists to build systems into your company.

- Module 3: Internal Operations
 - In this section, we will look behind the scenes of your operations, and learn ways to ensure that these new systems are working. It's important to have the buy-in of your team when implementing new systems into your business, so creating standard operating procedures for existing and new staff is crucial.

- Module 4: Sales and Marketing
 - This module will focus on several different methods of automation to use in your sales and marketing, and deciding on which one works best for your business.

- Module 5: Choosing the Right Program
 - In this section we will break down what it is you need from a software, how to choose what is right for you, how to implement it, and how to evaluate if it's working or worth the time and money spent.

- Module 6: So What Now?
 - In our final module, we will go over the key takeaways for this course and make short term goals so you can apply what you've learned from this course into your business!

By the end of this course, you'll have a better idea of what your operations look like, and where they could use automation to save you time and money. Not only will you determine what part of your business needs to be automated, but we'll guide you through choosing a software, the implementation process, how to evaluate its efficiency, and resources on our recommended platforms and systems! As you work through the course, remember, you can always drop into our coworking sessions for additional support. Check our website for upcoming dates and times.