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!

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**.

- **Mileage or Gas**: Track mileage or Gas/car expenses
- **Meals**: Track business meals and entertainment.
- **Meetings**: Track meetings, dues, events, conferences.
- **Supplies**: Keep records of office supplies and business tool expenses.

Consult with a financial professional.
STRATEGY → EXECUTION → SUCCESS

CRM
CUSTOMERS

POA
PLAN OF ACTION

SECURITY
SYSTEMS
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.
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.
SECURITY

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

Create an intranet in WordPress and use secure passwords. Monitor access.
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.

**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

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

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

~ Damon Richards
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

WORK IN PJ’S

Be prepared for client calls - ALWAYS

ACT DUMB

Especially on social media, mind your comments

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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