5 Fast Ways To Scale Your Biz
(EVEN IF YOU DON’T HAVE A BIG TEAM, YOU THINK YOU SUCK AT DELEGATION AND YOUR SO-CALLED SYSTEMS ARE A HOT MESS)

Brought to you by Marta Costa & OnlineProfitandChill.com
Dear Entrepreneur,

Are you ready to scale your biz so that you can serve more people, make a greater impact and make more money while actually working less???

IT’S NOT A MYTH! IT IS 100% POSSIBLE!

But...I also know that it’s not so easy to

1) Know what to consistently focus on to stay in your genius zone;
2) Decide how to best allocate your funds to get the most bang for your buck;
3) Prioritize who to hire to most effectively move the needle forward...and that’s just the tip of the iceberg.

Some days it feels like you’re just putting out one fire after another and you’re stuck in Ground Hog Day.

I’ve had those days too...a little more often than I care to admit.

But there came a point in time when I had to be more intentional than scattered and more intent on helping more people without sacrificing my personal life than giving my all (and then some) to just a few.

Once I made that shift for myself (and the people I loved), my business took off! Everything changed...the growth, the opportunities, the money...

IT ALL STARTS TO COMPOUND (LIKE INTEREST) WHEN YOU DECIDE TO GROW.

When you decide to stop being held back by overwhelm, indecision and doubts. When you decide to fully live your purpose at the highest level. There is NO reason why you can’t have a business that supports you and your dream lifestyle!

That’s why I put this guide together - to show you the way to help you grow you impact, influence and income -- without the sacrifice, overwhelm and burn out I went through!

Enjoy!

Love,

Marta

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Set Yourself Up For Success

One of the things I see entrepreneurs struggle with is knowing what to focus on and when. Everywhere you look there’s yet some other shiny new strategy you need to incorporate immediately!

With so many distractions and noise popping up on our screens and devices, it’s more important than ever to carve out times and places when you focus solely on scaling your business.

This isn’t something you can do in an afternoon after a day of client calls. It’s going to take some time, focus and determination. Rome was not built in a day.

Each Sunday I take a few moments to myself and write out a brain-dump (we really need to come up with a better word for this!) of what I want to accomplish for the week. Most of this is coming from my quarterly plan, but some of them are spontaneous things that come up or things that didn’t get done before.

Next, I decide which of the things on the list can be handed off to someone else on my team.

Then, of the remaining items, I break them down into categories according to how much brain power is needed to do them.

- **Full Focus** -- these are tasks that need your complete attention or creativity. If you’re interrupted while doing them it’s hard to get back into the flow. (things like recording a video, training, mapping out a course, creating a marketing plan, etc)
- **Partial Focus** -- these are tasks that need some brain power, but if interrupted you can jump right back in pretty quickly. (things like answering emails, cooking, meetings, project management, etc)
- **Mindless tasks** you can do without much exertion (things like checking social media, driving, organizing my desk, making doctor’s appointments, etc)

Lastly, I open up my calendar put everything in. If it’s not on the calendar, it doesn’t happen :) I still use a paper calendar as well as my Google Calendar. There’s just something about physically writing things down that still feels good to me.

What time of day are you most productive and effective? You know...the time of day when your brain is just ‘on’ and functioning at its best...

Whenever that time is for you...block out as much of that time as you can every week. For me it’s between 9-11am and then 12-2pm. After lunch when I’ve refueled is the best time for client or sales calls!
Here’s an example:

My calendar hasn’t always looked like this...it’s been a work in progress. But notice where most of my focus is.

1. Each day I start with a morning routine to ensure I begin the day in the right mindset. This is something that I’ve known about for years but didn’t really start implementing until recently because I really, really, really love to sleep! Although there are days when I just turn the alarm off and keep on snoozing, I can definitely see the difference in how I feel and how productive I am when I practice this.

2. As a learning junkie...the only way to keep from distracting myself and losing entire days checking out people’s courses is by giving myself 1 hour each day to dedicate to some type of learning or training.

3. Next, I have dedicated time each morning to clear out my inbox and check in with our current projects and team.

4. Then, it’s Focused Project Time. By this time of the morning I’m pretty focused, alert and fresh.

5. There are designated times for Client calls.

6. There are designated times for Sales calls.

7. There is a set time to re-check my inbox and wrap up whatever I’m working on to close out the day.

There is plenty of white space to fill in whatever partial focus tasks or mindless tasks that need done for each day, but I also use that time for floating around the pool, doing laundry, and the occasional nap, all 3 of which are great ways to wipe the slate clean and get a little mental health break.

The key thing here is that everything else is fit around those first 7 items. They are the lifeblood to both sustain your existing business and scale up to the next level.

And while it can feel a little restrictive at first...stick with it! It can 10x your productivity and change your life!
(THERE'S JUST NO APPEALING WAY TO SAY THIS, BUT THE RESULTS ARE AMAZEBALLS WHEN YOU DO IT!)

I could make the argument that this is THE key to scale...but then again...I could make that same argument for each of these keys...so don’t skip a single one :)

Every single thing that is done more than one time in your business should have a system and a process. Every single one.

Whether it’s responding to customer service emails, or creating a product, or sending a broadcast email or onboarding a new client...everything that happens more than once.

Period.

Even if you’re the only one in your business.

Even if you have an amazing project manager or business manager that handles all of the pesky details.

Even if you have a whole ginormous team with a pretty org chart broken up by roles and responsibilities.

Can you tell how strongly I feel about this?

You may not have to be the one to create the system or document the process, but you do want to have your hand in it so that you fully understand everything that it takes to run your business.

You’ll want this so that no matter who is doing the task, it is done right and to your standards each and every time.

The simplest way to begin is to just start documenting each process as it is being done.

If you don’t have time to do that, then start with tasks that make you money and then the tasks that make your clients happy.
SYSTEMS GENERALLY FALL INTO 4 CATEGORIES.

1. SUPPORT/ADMIN
All systems supporting the delivery of the products/services

2. DELIVERY/SALES
All systems concerning the delivery of the products/services

3. MARKETING/PROMOTIONS
All systems that deal with promotion and marketing or products and services

3. GROWTH
All systems concerning metrics, financial and business development.

When you’re documenting the process for each system be sure to include:

- Title
- Prerequisites - links to any resources you will need to carry out this process.
- Purpose - what you are doing and why
- Policy - what are the guidelines for this task, how often does it happen, does it need to be approved....some things to keep in mind
- Party - who are the responsible parties for this task
- Process - what needs to take place
- Procedure - step by step documentation (this can be written, on video, or screenshots) of the process. The actual how-to.

SIDEBONUS #1! Most businesses processes just sort of come together in the moment and are never really examined. Going through this process will show you where there is any overlap, redundancy or holes in your system and allow you to streamline, cut costs and give your biz a back end makeover.

SIDEBONUS #2! Once a process is documented you can easily hand it off over and over to various team members and skip so much of the time being spent on training a new team member.
AUTOMATE EVERYTHING AUTOMATABLE (WITHOUT LOSING THE ‘PERSONAL’ TOUCH)

Technology has come so far and what used to take weeks, days or hours can now be accomplished so much more quickly!

Back in the day onboarding a new client could take several days. Now it can all be done within minutes.

The trick is to still keep the human touch and insert your personality and branding into everything that’s done so that they still get the warm fuzzies about working with you.

Start by reviewing everything that you (or your team) do on a daily basis and ask yourself (or your team) whether any of it could be streamlined or automated in any way?

If you’ve already started documenting your systems and processes, you’ve probably already got a good idea of what these things might be.

HERE ARE JUST A FEW THINGS THAT CAN BE AUTOMATED WITHOUT LOSING THE PERSONAL TOUCH.

SCHEDULING
No one, and I mean, no one benefits from the 12 email back and forth of does Tuesday at 4 work for you, etc. Use a tool like Acuity to give your folks that warm, welcomed feeling without wanting to tear their hair out messaging you to find a convenient time.

BILLING FOLLOW UP
This is one of those things that gets bigger as your business grows. People’s credit cards expire, recurring payments fail. Most shopping cart systems will let you set up an automated campaign to get in touch with those folks and help them update their credit card details so you don’t have to go chasing after them.

CLIENT ONBOARDING
Whatever that might look like for you, you can set things up so that from the moment someone purchases from you, they immediately get a welcome email or message from you (including an agreement to sign, if needed) and instant access to whatever they purchased.

CLIENT DELIVERABLES
You can build out your client journey in a management system like Trello to track each individual’s progress (for your one-on-one work) and track their progress each step of the way. If you have programs or products, you can use a membership site to do the same.
CUSTOMER SERVICE

A good ticketing system can keep all of your customer service organized while letting your customers know that their message is received, they are valued, and when they can expect you/your team to respond. Most ticketing systems will let you set up an FAQ section that can cut down considerably on the hours usually spent giving the same responses over and over again.

WEBINARS

If you have a proven webinar that converts, taking it and automating it is a no-brainer. You can automate the entire process from beginning to end and watch the sales roll in without you having to actually deliver that webinar each and every time.

METRICS

One of the hardest things to do in an online business is keeping track of all of the different avenues that people take to find you and purchase from you. Between different organic traffic sources and paid traffic sources it gets really hard to know where to focus your efforts if you can’t track where your sales are coming from. Tracking links and tracking codes go a loooong way to getting you the numbers you need. You can create a pretty snazzy dashboard detailing all of your important numbers when you combine all of your software and reporting into one place using tools like Zapier.

BONUS TIP! A good all around System like Kartra combines just about everything you need in one place and save you a ton of money using lots of different programs.

Your online business requires a bunch of different solutions that must be duct-taped together, often to frustrating results. You know the pain: your checkout page won’t add your customers into your mailing list, or your helpdesk portal won’t connect with your contacts database, or your membership site won’t revoke access when a user refunds payment, etc.

Utterly frustrating, and a huge waste of time... until now!

All the individual sections of Kartra are woven together so they seamlessly “talk” to each other, without having to configure any integration whatsoever. As a result, the tracking is global!

For example: if someone lands on your Kartra page, Kartra Analytics tracks it. If a user fills in a Kartra form, Kartra Mail subscribes him/her to your newsletter. If a customer pays through a Kartra checkout, Kartra Memberships automatically sends out the login credentials. All of it interconnected by default.

That’s the power of one: everything under one synchronized umbrella.
Assemble Your Avengers

(IE. YOUR SQUAD, YOUR TEAM, YOU BUSINESS BESTIES)

Over the years I’ve worked on dozens and dozens of teams and by far the ones that were the most successful were the ones where we all felt like we were coming together for a common cause or purpose. We had a mission and each person used their skills and gifts to bring that mission to fruition.

Here are some things to keep in mind as you assemble your team to scale your biz:

- Ideally, for the purposes of scaling your business, you want to delegate as much as you possibly can, so that you can stay in your genius zone. But in the beginning, start with offloading the things you really don’t enjoy doing. Then move on to the things where you are becoming the bottleneck in your business.

- Hire for where you want to go, not necessarily where you are now. There are folks who can easily maintain your existing systems very well, but when you’re looking to scale, you need to find the folks that can not only sustain what you have, but already know the landscape ahead and advise you the best way to get there.

- Look for folks with complementary personalities and skills. It’s good to have a little overlap but the idea that you have to clone yourself or your best team member over and over is not right. You need a nice blend to give you different perspectives and skill sets to tap into as you grow.

- Give each team member ‘ownership’ over their own domain. Don’t micromanage. Be clear about what you want, why you want it, and when you want it and then let them take it from there. Most people skip the why, but it’s important. It gives your team a sense of belonging and helps them feel like they’re a part of the overall mission and not just a cog in the machine.
Respect their boundaries and treat them like you would like to be treated. In this virtual world, it's easy to forget that we're all human beings on the other end of that email or message.

DON'T think in terms of expense and DO think in terms of return on investment. How much faster can you get where you're going if you bring someone on to spearhead a particular project? How much money are you leaving on the table month in and month out that that project isn't getting done?

Do the math...if you hypothetically want to make 300k working 20 hours per week...your hourly rate is technically $288. In light of that, is it worth $288/hour to be answering emails or making your own graphics, designing your pages, managing your own projects, following up on missed payments, etc? It's quite tempting to think that you're saving the expense of hiring people to do these things, but from this perspective, it's actually costing you more to NOT hire.

BONUS TIP! Invest your new found time into sales and marketing and your return on investment will skyrocket.
LEVERAGE LIKE YOUR LIFE DEPENDS ON IT

Leverage is what makes the difference between earning “just enough” money to get by, to reaching the million dollars and beyond point.”

- Yaro Starak

There are lots of different ways that the term “Leverage” is used but for the terms of this guide, I’m referring to Leverage in a simple context; reuse, repurpose, recycle everything you can.

Here are just a few things you can leverage:

**YOUR CONTENT:**
- Paid trainings you’ve done for your private clients, mastermind, etc can be repurposed as either high value freebies to build your list or as a low-ticket upsell, order bump or tripwire to any related products or programs you may already have.
- Free trainings you do on Instagram or Facebook Live or LinkedIn can be spun out as content for your social media, a podcast episode, blog posts, newsletters, etc
- Existing products and programs can be re-launched or used as upsells or downsells to other offers.

**YOUR CLIENTS:**
- Use questions and conversations with your private clients as inspiration for all of your free content.
- Keep track of common themes or concerns as ideas for new products or programs or trainings
- Ask your ideal clients for referrals
- Create an off-boarding system that ensures that you get great testimonials and case studies

**YOUR BIZ BESTIES:**
- Create an alliance of others who serve the same audience to cross-promote and support each other not just during launches and JV promotions, but in the course of your day to day social media marketing too.
- Ask them to refer you whenever it makes sense and offer to do the same

**YOUR TEAM:**
- Use your team to add a ‘Done For You’ component to your packages when it makes sense
- Ask your team for referrals--they’re usually your biggest cheerleaders!
- Add value to your programs or packages by having team members do additional trainings in their areas of expertise
Marta Costa, founder of Online Profit & Chill™ specializes in helping online coaches shift from exhausting, stressful business models to more leveraged, automated, and chillaxed forms of marketing. She believes that 1-on-1 offers, manual selling, and launches are a recipe for burnout and bitterness.

If you want to begin leveraging group coaching programs and automated marketing to ease the journey to building your empire, then Marta Costa is the expert for you!