

Section #4: Technology & Systems

Systems

- “Dealing With Difficult People” aka: Customers/Team
 - How can I help you?
 - Besides _____, what other issues (problems) are you experiencing?
 - OK, if I am able to resolve _____, we can move forward, right?
 - Great, here’s what I can do, _____

Create the 'Systems'

- Pilot (test) Very Often, Try New Things
- Shortcuts Don't Require You to Give up Quality or Your Ethics, They Might Save You Time/Money
- How to Make it/do it Better?
 - Write down how it's done today
 - Include what actions are taken to get it done
 - How can you combine tasks or even remove steps?
 - Can this process grow and handle more volume?
- Simplicity is Key- Simple Methods Are More Likely to be Used and Followed
- Focus on Doing Stuff Versus New 'Tools' Like Software and Technology That 'Track' Stuff

Create the 'Systems'

- Put the Person 'Doing the Work' in Charge of Writing it Down and Figuring Out How to Make it Better
- Create the Universal Systems For the Way Things Must be Done, no Exceptions Unless Truly Necessary
- A Common Attempt to Fix a Problem is to Shuffle the Work to Somebody Else (or Worse, Outsource it)
 - Be sure to check to see how you can make the system easier and less complex...first!

-CASE STUDY-

Elaine Williams/Bloomfield, NJ
"Messy & Un-Organized to FOCUSED!"



Email Tips

- Stop the Email Exchanges- Consider my 'File Folder' System
 - STOPS the ongoing "Email Tennis Match"
 - Prioritize the items in the folder before your call
 - Consistent, short, two-way communication
- Unsubscribe or Set up Alternate Email Address For 'Tips'
- Set up Automatic-Email Rules/Filters
- 4 D's
 - Delete
 - Delegate
 - Do it now
 - Defer it (and file it for later)

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Exhibit C

STANDARD OPERATING PROCEDURE (SOP)

Action: Fill in

Initial ---
Implementation
Date:

Business Fill in
Area:

Revision Date: ---

Why (Scope): Explain the WHY (benefit)

What (Guideline): Explain the WHAT

Who: ...is responsible to carry this out

Step by Step 'Instructions', How, When:

1. --- Explain the HOW and WHEN
2. ---
3. ---
4. ---

Outsource Checklist

- ✓ I am Not Moving a Problem 'Further Away'
- ✓ I Have a Step-by-Step 'System' Written Out and a 6th Grader Can Understand it
- ✓ I Have Defined What Success Looks Like When This is Done Right, it Looks Like _____
- ✓ I Can Measure Success Objectively, I Have a Scorecard and Defined When the Scorecard is Sent to me

Outsourcing

- In House vs. Outsourced Functions
 - Customer service, IT security, network security, shipping/fulfillment, payroll, etc.
- What are the Key Functions You Provide to Customers Today That You do Not Want to Outsource?
- Can 'Somebody' do it Better Than You?
 - Landscape story, brochure story
- What Investments Will be Required of You 'Doing it Yourself'?

Outsourcing

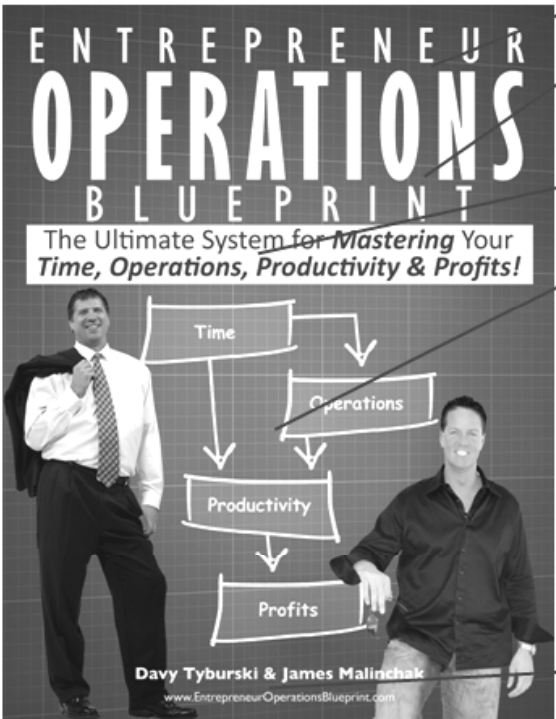
- You Need to Know How You Want it Done Before You Send it to 'Them'
- What Tasks do You Want Done?
- How You Want Them Done (Write Down the Step-by-Step Actions)
- How Can Your Software (Infusionsoft) Play a Role Here?
- Source Vendors Using Capability, Culture, Commitment
- Decide if Geography Matters to You and Your Customers
- Service Level Agreements Must be in Place

Designer/Webmaster Steps for Success

1. Draw Out What You Want on a Piece of Paper (the 'Skeleton' of the Website or Brochure)
2. Send it to Your Outsourcer, Have Them Build the 'Skeleton' and Send it Back to You For Review
3. Revise the 'Skeleton', Then Fill in the Content
4. Revise the Content, Send Changes Using the PowerPoint Template Called 'Design Template'

*This slide & the next slide were
ADDED After the Live Event*

Designer/Webmaster-Steps for Success



Annotations for the book cover design:

- Add about ¼ inch space between the words
- Add about ¼ inch space between the words
- Move this box down about ¼ inch
- Make me, James and the boxes in this section smaller, keep the same aspect ratio so it all stays in scale.
- Increase our names and the website name by one font size

1

Technology-Google

Web



Web Search

Search billions of web pages



iGoogle

Add news, games and more to your Google homepage



Bookmarks

Access your bookmarks and starred items



Google Chrome

A browser built for speed, simplicity and security



Toolbar

Add a search box to your browser

Mobile



Mobile

Get Google products on your mobile phone



Search for mobile

Search Google wherever you are



Maps for mobile

View maps, your location and get directions on your phone

Media



YouTube

Watch, upload and share videos



Images

Search for images on the web



Videos

Search for videos on the web



Picnik

Fast, easy and fun photo-editing



Books

Search the full text of books



News

Search thousands of news stories



Picasa

Find, edit and share your photos

Technology-Google

Geo



Latitude

See where your friends are right now



Earth

Explore the world from your computer



Maps

View maps and directions



Panoramio

Explore and share photos of the world

Home & Office



Docs

Create and share your online documents, presentations and spreadsheets



Calendar

Organize your schedule and share events with friends



Talk

IM and call your friends through your computer



Voice

One number for all your phones, online voicemail and cheap calling



Desktop

Search and personalize your computer



Checkout

Complete online purchases more quickly and securely



Gmail

Fast, searchable email with less spam



Sites

Create websites and secure group wikis



Translate

Instantly translate text, web pages, and files between over 50 languages.



SketchUp

Build 3D models quickly and easily



Pack

A free collection of essential software



Google Health

Organize your medical records online

Technology-Google

Social



Blogger

Share your life online with a blog - it's quick, easy and free



Kno!

Share what you know



Reader

Get all your blogs and news feeds fast



Groups

Create mailing lists and discussion groups



Orkut

Meet new people and stay in touch with friends

Specialized Search



Blog Search

Find blogs on your favorite topics



Patent Search

Search the full text of US Patents



Finance

Business info, news and interactive charts



Alerts

Get email updates on the topics of your choice



Custom Search

Create a customized search experience for your community



Product Search

Search for stuff to buy



Scholar

Search scholarly papers




Trends

Explore past and present search trends

Technology-"Business Applications"




Solution	Infusionsoft (PLUS)	Constant Contact	Salesforce Professional	AWeber
 CRM				
Drag & Drop Web Form Builder	✓			✓
Behavior Tracking	✓			✓
Opportunity Management	✓		✓	
Lead Qualification and Distribution	✓		✓	
Calendar and Appointment Tracking	✓		✓	

Special Note- If you choose to invest in this product/service,
JMI may receive a commission for making this opportunity available to you.

Technology-"Business Applications"

Solution	Infusionsoft (PLUS)	Constant Contact	Salesforce Professional	AWeber
 Email Marketing				
Drag & Drop Email Builder	✓	✓		
Behavior-Based Personalization	✓			
Spam Scoring	✓	✓		
Multimedia Marketing	✓			
 E-Commerce				
Storefront and Shopping Cart	✓			
Invoicing and Collections	✓			
Inventory and Fulfillment	✓			
Affiliate Program Management	✓			

Technology-”Business Applications”

Solution	Infusionsoft (PLUS)	Constant Contact	Salesforce Professional	AWeber
 Automation				
Multistep Autoresponders	✓		✓	✓
Campaign Builder	✓			
Sales Automation	✓			
Workflow Automation	✓			

Technology-"Business Applications"

BigMoneyCart.com

Autoresponder

Email Campaigns

Ad Tracking

Shopping Cart

Shipping Options

Payment Processing

Recurring Billing**

Upsell Express

Affiliate Software

Digital Downloads

Special Note- If you choose to invest in this product/service,
JMI may receive a commission for making this opportunity available to you.

-CASE STUDY-

Gabrielle St. Leger/Houston, TX

"He [Davy] kept it so simple, something that was so complex in my mind...we now will have the back operations systems that we need...Davy taught me how to implement on the back end!"



Technology 'Forced Ranking'

Sample Data

Want Need	I Soft	Big Money Cart	A-Weber	→
Send Emails	X	X	X	
List Mgt.	X	X		
Auto Responder	X	X	X	
Squeeze Page	X			
Shopping Cart	X	X		
A/R	X			
Investment	\$ —	\$ —	\$ —	

Other Technology Tools

- Online Data Backup- Carbonite, Dropbox, Mediafire
- Always Read the Fine Print!
- Google Docs-Suite of 'Cloud Applications'- Text, Spreadsheet, Presentation, Forms Good For Basic, Real Time Document Collaboration
 - GoToMeeting, WebEx are more robust