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TECHNOLOGY GUIDE

Find the right systems for your business



**"The true knowledge is
not in the things, but in
finding the connections
between the things."**

Back end systems for your business are an absolute MUST!

It is important as you process this section, that you take the time to set up each system. Read over the system descriptions below and then use the checklist at the end to set up each system for your business.

TIP: If you need additional training on a system, please reach out for a 1 on 1 training session to learn how to set up the system for your business.



Client Retention Management System Dubsado is a business client retention service that is designed to cut out busy work. In Dubsado, you can build relationships, schedule appointments, and create workflows to streamline your projects from beginning to end.

Here is a list of what Dubsado has to offer:

COMMUNICATE

with your clients through emails, forms, contracts and invoices AUTOMATE custom workflows to send emails and complete tasks (so you don't have to)

CONNECT

your email, calendar, and payment processor to keep everything in one place REPORT leads, sales and financial goals

CUSTOMIZE

forms, domains, and client portals branded to your business

SCHEDULE

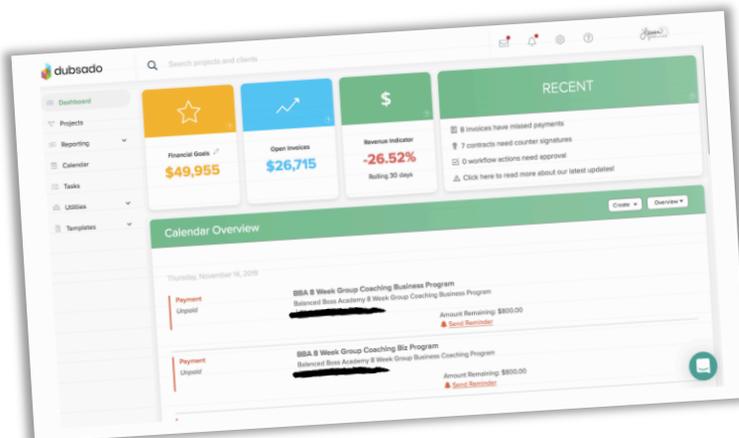
appointments, payment schedules, and send reminders to client's automatically

SHARE

access to team members and accountants for ease in project management

Dubsado has everything you need to run your service-based business with EASE. Try their free trial and begin to see how setting up workflows for your business will help minimize your time completing admin work.

Visit dubsado.com to start your free trial



Dubsado
Dashboard





Email Marketing System Convertkit is an email marketing software that allows you the ability to stay in touch with your followers and increase your income. Convertkit is the currently one of the only email marketing systems that does not go to "spam" in a customer's email inbox.

Here is a list of what Convertkit has to offer:

GROW

your audience through customized/embed forms on your website

CREATE

landing pages to grow your email list WITHOUT a website

ORGANIZE

your subscribers through tags based on their interests, activity etc.

AUTOMATE emails that feel personal

OPTIMIZE

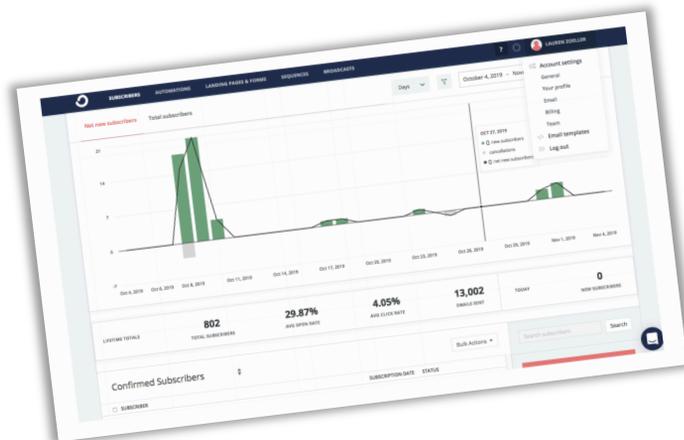
funnels to keep your subscribers engaged in your next offering

INTEGRATE

your e-commerce, landing pages, membership site providers, and more to sell straight from your emails

Convertkit is a one stop shop when it comes to email marketing. There are other services on the market such as: Mailchimp, Infusionsoft, Drip etc. Make sure you research all options before deciding the best one for your business.

Visit convertkit.com to start your free trial



**Convertkit
Dashboard**





Accounting System Quickbooks Self Employed is an accounting software that gives you everything you need to track your income, mileage and expenses as an entrepreneur. You can connect your QuickBooks account to your Dubsado account for ease, and if applicable, file taxes with TurboTax.

Here is a list of what Quickbooks Self Employed has to offer:

ORGANIZE your business and personal expenses

TRACK your mileage

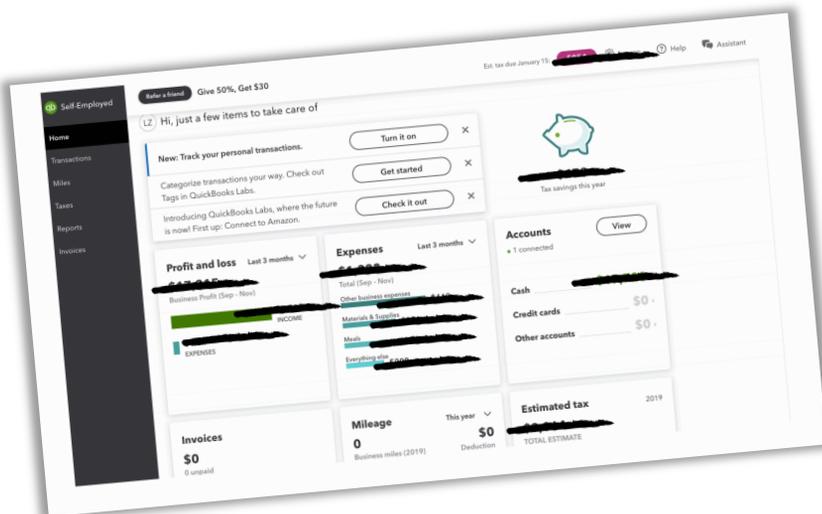
SEND invoices to clients if applicable

MAXIMIZE your tax deductions

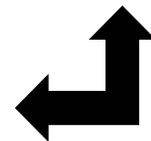
ESTIMATE your quarterly taxes

CONNECT your CPA or TurboTax to your account for easy tax filing

Once you set up your accounting system, make sure to set up a schedule to check your books and make sure everything is balanced. This task should be a part of your weekly schedule



**Quickbooks
Dashboard**





Organizing Content System Google Drive is FREE with a google account and is a great tool for organizing content and sharing content with other clients and colleagues. Think of Google Drive as an external hard drive that you do not have to carry around with you! Here is a list of what Google Drive has to offer:

ORGANIZE and upload your content in one place

SHARE your content with others

CREATE

word documents, spreadsheets and presentations straight from your drive

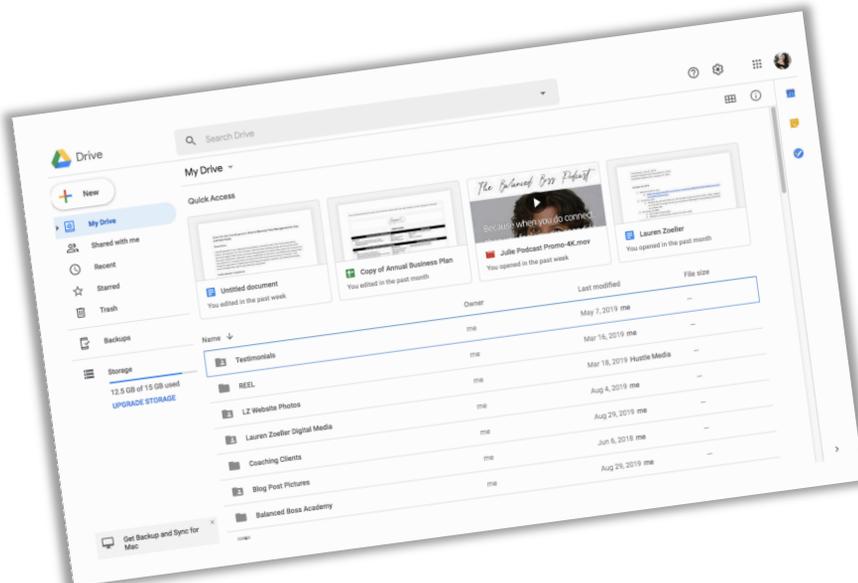
UTILIZE up to 15GB of free storage

COLLABORATE

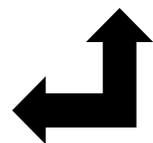
with others through dual edit options on uploaded content

Google drive is a great place to keep all of the documents for your business in one place. If you are working with a website designer, digital media consultant, client etc. give them access to the documents that may help them complete their task(s)!

Visit www.google.com/drive to create your google account



Google Drive Dashboard





Appointment Setting System If you are creating a service-based business, Calendly will help you schedule meetings without the back-and-forth emails.

Here is a list of what Calendly has to offer:

CREATE your own availability preferences

SHARE links for people to schedule a time to meet with you

INTEGRATE your current calendar to prevent double booking

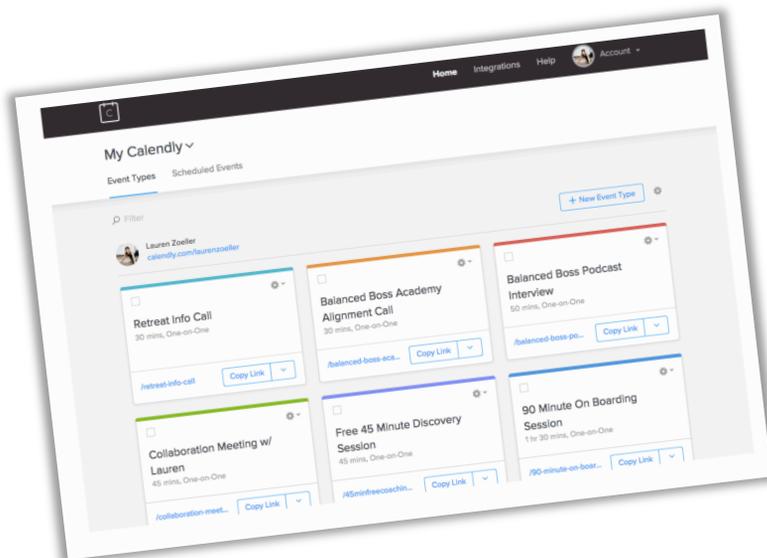
SET buffer times in between meetings to allow ease in your schedule

CONVERT time zones at booking so everyone is on the same page

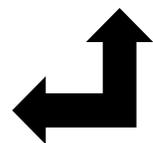
INTEGRATE with Zoom for ease in meeting setup

Calendly is key for running a service-based business with ease. Use different meeting types and set boundaries around how many meetings you will allow yourself to take each day.

Visit www.calendly.com create your Calendly account



Calendly
Dashboard





Email Organization System Boomerang connects to your Gmail and can help you organize your emails and schedule responses for a later date. If you suffer from emails piling up in your inbox, this is the system for you!

Here is a list of what Boomerang has to offer:

SEND

emails at the perfect time by writing and scheduling a send for later

REMINDERS

allow you to be notified when someone does not respond back

TAG important emails that you need to read later

ORGANIZE

emails in respected folders for ease in finding when you need them

DELETE emails that you do not want versus "Archiving" them

RECEIVE

daily email briefings from Boomerang's automated voice service

The Boomerang app for Gmail is the best way to stay on top of your emails and eliminate a messy inbox. Plan to visit your boomerang app once in the morning and once at the end of your work day to keep your inbox clean and organized.

Visit www.boomeranggmail.com or download the boomerang



Conference System Zoom is the ultimate platform for conference calls and meetings. Use Zoom to hold group sessions and/or meet with clients individually over a video call anywhere in the world.

Here is a list of what Zoom has to offer:

HOST over 100 participants in one Zoom meeting

VIDEO conferencing allows attendees to see each other face to face

PERSONAL MEETING ROOM with call in numbers to dial in by phone

GROUP COLLABORATION options to host a meeting with another host

SHARE your screen in meetings for easy presentation and webinar options

RECORD your meetings for further use

Zoom has several different options when it comes to purchasing a plan. Take a moment to visit the Zoom website and find the plan that will work best for your business.

Visit www.zoom.us to create your Zoom account



PayPal is an easy and quick way to get paid for your services. It does not require that you have a merchant account to process credit cards, nor do you have to worry about checks. Here's an easy set of instructions to get you started. Go to: <https://www.paypal.com/home>

If you do not have an account – click Sign Up on the main page. (upper right corner) On the next screen, click Create a Personal Account. Click Next.

On the next page, fill in:

- Your Email Address.
- Create a Password. Do Not use any spaces (must be 8 characters or longer with one symbol such as: !@#\$%^ or one number.)
- Retype the Password you chose.
- If your password is accepted and they match, you will receive two Green Check Marks.

Complete the Verification Code.

Click Next.

On the next page you will want to complete your personal data:

- Legal First Name
- Legal Last Name
- Street Address
- City, State, and Zip Code
- Mobile Phone Number
- Read and Agree to the Terms and Conditions

On the next page you will need to link a debit or credit card number. This is if you want to purchase anything through PayPal.

Below this you will see LINK BANK ACCOUNT INSTEAD. You will want to click here and fill in your bank name

and account. This way you can easily transfer money from your PayPal account into your Bank Account. (You have the option to link either a checking account or a savings account.)

Click Next.

You may be asked if you want to apply for PayPal credit. You do not need this at this time.

Your account should now be set up and ready for you to use.