



Optimizing Your Business for Success

Join us for [live webinars](#) on June 16 & 18, 2020 for a more in-depth discussion on the information in this guide.

Take time to read this guide on the topics below, and prepare questions to be answered during the webinar:

- Propel your business by understanding your “why”
- Streamline your business foundation
- Integrate technology and safety procedures when working with clients

Propel your business by understanding your “why”

Think about and answer these questions about yourself.

1. Who am I?
2. What do I want?
3. What is my purpose?

Propel your business by understanding your “why”

Do you feel fulfilled by the work you do? To do this, you must understand the following:

1. Why did you start your business?

2. Why do you do what you do?

3. What are your passions?

4. What are your strengths?

5. What are your values?

6. What are your talents?

Streamline your business foundation

Plan for the future by creating a strong foundation and understanding where you want your business to grow. How do you ensure your business will go far?



Finance

Whether you are just starting your business or you've been in business for many years, your financial decisions are key to the health of your business. Make good, measurable, realistic plans for both the short and long term. Write these down and check back often to check your progress. These plans should align with your "why."



Operations

Always deliver as promised to keep your new and loyal customers. Put your systems and processes into place and work your plan. More on systems and processes in an upcoming webinar. List three processes you have in place and ways you may improve upon these.

- 1.
- 2.
- 3.



Accounting

Keep track of your expenses, your profit and which items you sell/produce yield the biggest profit. Do time studies for the different services and products you provide as a way to measure both expenses and profit. Remember, the more data you have, the better you will be able to understand, tweak and improve your business. List the top three items or services your business offers.

- 1.
- 2.
- 3.

"if you cannot measure it, you cannot improve on it."



Marketing

Marketing is used to expose you to new markets and put you in touch with your new, ideal clients. Understanding your "why" will help you form the marketing message for your business. However, along with marketing you also need to build your team members, deliver a great product, on time and with a smile. Making sure your team members understand your "why" ensures your clients receive a consistent message about your company. List your top three marketing goals here:

- 1.
- 2.
- 3.

Integrate Technology and Safety Procedures When Working with Clients

Due to COVID-19, it is important to embrace technology and new ways of doing things to reach your clients and make sure they feel safe while working with you.

Listed below are a few methods to integrate **technology** when working virtually with clients:

Zoom

Use for video conferencing, webinars and conferencing. Zoom meetings are easy to start, join and collaborate across any device. Zoom meetings syncs with your calendar system and can be joined from desktop and mobile. The meetings may be recorded locally (to your computer) or in the cloud. Get started at [Zoom.us](https://zoom.us).

Loom

Loom is a video recording tool that helps you get your message across through instantly shareable videos. With Loom, you can record your camera, microphone and desktop simultaneously. Your video is then instantly available to share through Loom's patented technology. Get started at [Loom.com](https://loom.com).

YouTube

Create YouTube videos to inform clients of your new safety procedures, new policies or new products. Record from your device and upload to your YouTube channel. This will allow you to get a URL link to send the videos in an email or newsletter. The videos may be listed as Private, Unlisted or Public, depending on how you decide to share them. Get started at [YouTube.com](https://youtube.com).

Safety procedures may include the policies of how you will work with clients during and/or after COVID and may answer the following questions your customers may have:

1. What are your new safety procedures and how do they differ from how you used to work?
2. Will you be wearing a face mask when meeting in person?
3. Will you require the client to wear a face mask? Are you able to provide a face mask if they do not have one?
4. How many people will be in the home during the appointment?
5. Are you able to work virtually? Do you have a system and process written and in place for this?
6. Do you have new delivery and/or installation processes in place to ensure the health and safety of your client, yourself, and the installer?

There is not a right or wrong answer to the above questions. Understanding your "why" will help you answer these questions and help you to optimize your business for success.