

Behind the Scenes

What I use to Run My Business



Look behind the curtain of any business, and you'll see the tools that make everything work.



I have worked in multi-billion dollar corporations, small for-profit startups and small and large non profits. Different stages of business require the addition (or deletion) of different resources. When you're bootstrapping it, you can probably make do with leveraging a few core (free or low cost) resources. Below I will give you a look at what I use, have used and what I suggest. None of this content is sponsored and there are no affiliate links. These are honest real life solutions.

First a piece of advice that everyone should review as they are planning their resources. Make sure that you look at this comprehensively and then plan accordingly.

Identify your top three metrics.

Identify your top three goals and measurable activities associated with them. Focusing on these top three will create your momentum. Your attention and activities should be on meeting and mastering these objectives. Determine what these metrics are and ensure that you have the tools to measure.

Create a list of your top 10-30 clients or prospects and contact them.

Clients (and prospective clients) matter. To garner a greater amount of momentum, make a list of your top 10-30 clients. If you don't have this many, supplement the list with prospective clients.

Then make contact with each of these clients within the next 90 days. As the people who matter most to your business, it should be your goal to get yourself and your business in front of them to either begin or continue to build your relationship. For nonprofits, think of this as donors and potential funders.

Today, I want to take you behind the scenes of my business so you can see what tools I use (and which ones I'm evaluating).



WEBSITE:

I have hired people to build websites, hired SEO firms, built my own websites and watched a “few” youtube videos on how to drive traffic and how to monitor organic content.

Go Daddy – I use this website builder for my website and several client sites that I have built. I find this very easy to use. You can set up a domain, select a theme and publish your site in under an hour or two. There are also several different modules that you can add on to help with email marketing and ways to grow your reach and traffic. I recommend this for use of use and price.

WordPress — I use WordPress (self-hosted) as the platform for my site. (another business) I love the ability to make updates myself. I have hired people to build WORD PRESS sites and I have also built word press sites and made updates to word press sites. Again very easy to use.

Wix – I have not personally set up a WIX site – but I have helped people with their WIX sites. I would recommend a new business look at this as a possibility in addition to Go Daddy and Squarespace.

Square Space - I have not personally set up a Square Space site – but I have helped people with their sites. I would recommend a new business look at this as a possibility in addition to Go Daddy and Squarespace.

Where to Host:

Blue Host— This is the hosting company I’ve used for years. Their customer service is great and I have never had an issue.

Others you may want to consider - Based on others recommendations, I usually advise people to check out GoDaddy, HostGator, WP Engine or Synthesis for advanced businesses.



CALENDAR/SCHEDULING:

Google Calendar — I use Google Calendar for all my scheduling needs. I love that I can share a calendar with someone, and create multiple calendars inside my main schedule. I have a main calendar, then a Family calendar, and calendars for each business.

Acuity – This is a new tool that I am using to help with scheduling clients. What I love about this – is the ease of use in setting this up. You can integrate this to other calendars like google or outlook. Also, you are able to set up appointment types and set up schedules for each appointment type. This can easily be integrated to a payment system. I chose STRIPE. (more on that below)

Calendly – This is a tool that I have used in the past and love. The only reason that I moved from Calendly to Acuity is so that I am able to take online payments using STRIPE. Very easy to use and also easy to set up – in under 30 minutes.

PAYMENTS/INVOICING:

Stripe — Stripe is a great option. It is very simple to setup and the STRIPE dashboard allows you to review everything at a glance. This is also a great option for those that prefer to not use PayPal. Additionally, it allows me to create recurring auto payments – which saves time and money.

Harvest — I love Harvest for invoicing (and time tracking if you need it). Its low cost /month allows you to invoice, track your time, create detailed reports and more.



STORAGE/BACK-UPS/PASSWORDS:

Google Drive — I save everything in Google Drive. I create folders for each client, files that I use to manage my business, major projects that I am working on, and png and jpeg files that I will use for social media of long form content.

Dropbox — I love having Dropbox available on all my devices. I store files, course materials, and e-books. I also use it as a way to share big files with friends, clients, joint venture partners and vendors.

Last Pass — What did I do before LastPass?

It creates a Password vault that allows you to save ALL your important passwords in once place. Plus, it generates complex passwords for you, and then allows you to save them right away (so you don't even have to write them down). Then, when you go to log-in to an app, it's remembered your password for you.

BASK —My computer back-up. This works in the background to make sure everything on my computer is saved in the Cloud. Also, they offer remote access and can d-bug just about anything. My computer crashed a year ago and I called them. They logged on and through some kind of magic, were able to restore everything.

EMAIL MANGEMENT & MARKETING :

ConvertKit – I've tried a lot of email management systems, but nothing comes close to how much I love ConvertKit. You get the premium features at a reasonable price.

Others include: Aweber, MailChimp (great for beginners), Infusionsoft, and many others.

CoSchedule – I have always used an excel spreadsheet to map out my content week by week by social channel. This is something that I started using years ago. But I will be evaluating CoSchedule this year. I have heard so many great things about this – I am looking forward to reviewing this.



CoSchedule allows one to create a complete editorial and marketing calendar with drag & drop functionality. It syncs with WordPress, Google Docs and Evernote, and helps people stay totally organized with all of their content marketing needs.

Boomerang – A great email add-on tool that allows you to send messages back to yourself at a designated time. I love using this for follow up. I'll send an email to a prospect, then Boomerang it to come back to the top of my inbox a few days later. That way, it's out of my inbox but won't get forgotten.

PROJECT MANAGEMENT:

Evernote — I use Evernote for my project management. Whenever I create a new project, I create a new Project in Evernote. Then I can clip files, writing, audio notes into that notebook so they're all in one place. I can also share a Notebook with any relevant people so they can contribute too.

Asana —I've used this in the past, and had a bit of success with the tool and my team adopting this. I'm reconsidering again — so I wanted to list it. Like any tool, it's simply a matter of giving it enough time to work for you. Bonus: it's free!

Others include: Basecamp, Wrike, Podio, Workzone and many others.



SOCIAL MEDIA:

Edgar — This is a great tool. MeetEdgar makes it easy to schedule and automate your content on Facebook, Twitter, Instagram, and LinkedIn. From writing posts for you to re-posting evergreen content, Edgar has you covered!

HootSuite — I use this as my social media check-in, and it's where I do my engagement. I've created sub-lists so I can better curate the people I want to pay attention to. Keep your social presence active 24/7 by automatically scheduling hundreds of social media posts at once, across your social accounts.

There are other platforms out there that do similar things – but these would be the 2 that I would look at first.

I hope that this information is helpful. Years of experience, trying several different solutions and learning from clients and colleagues has allowed me to compile this list. Reach out to me if you have any questions.

Linda Handley

<https://lindahandley.com/>

Online Scheduling Link <http://bit.ly/2spM5LX>

