

Business systems and project plans



Business systems: Project management

- A system addresses a specific business issue.
- A system is automatic.
- Becomes routine, doesn't require much thought.

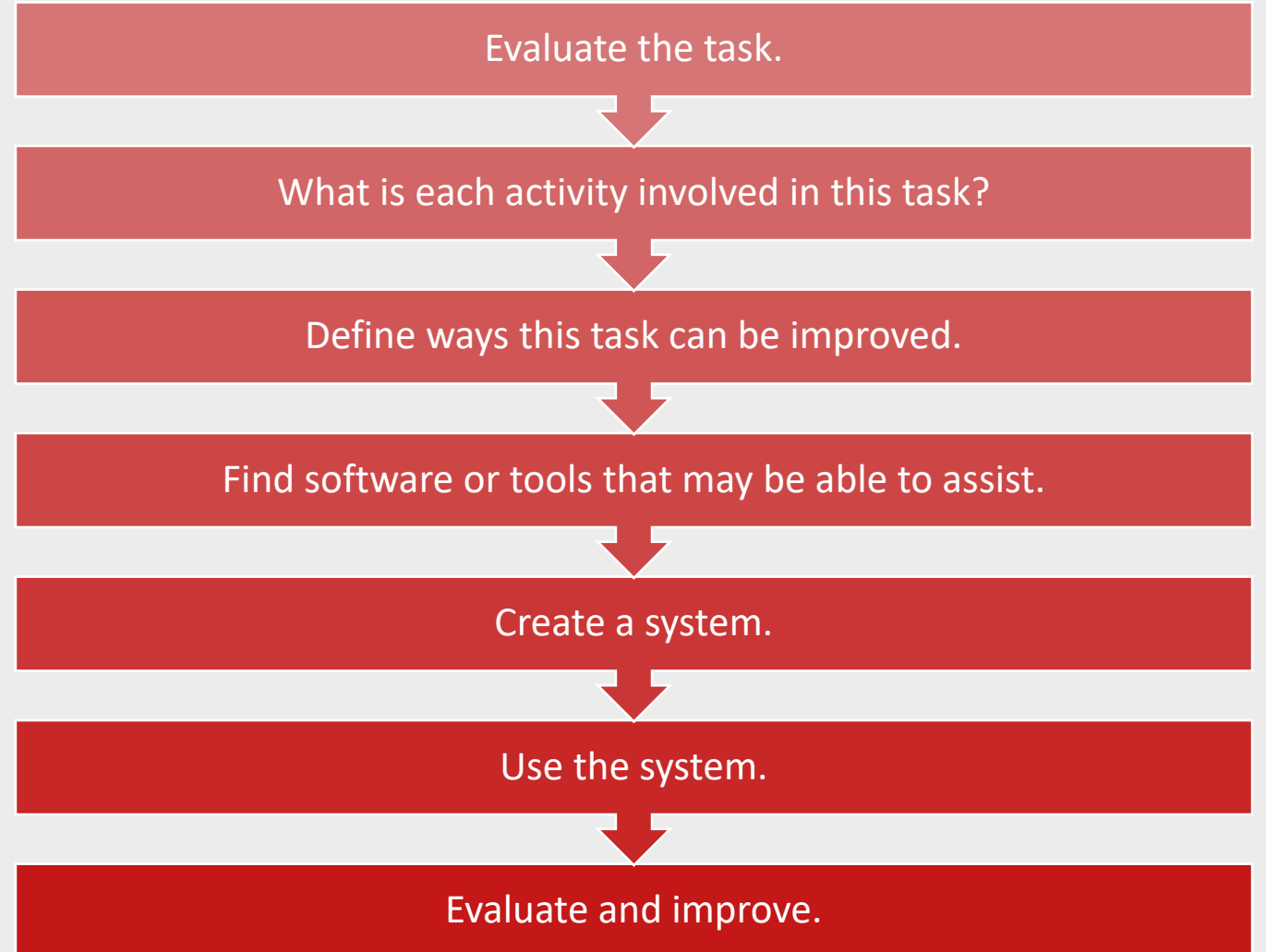
**Business
systems:
Great uses**

- Marketing funnel
- Prequalification
- New client intake/onboarding
- Policies
- Process for ushering clients through project from beginning to end
- Billing systems/accounting
- Follow-up with past clients
- Onboard employees and contractors
- Project management

Business systems: Reasons to use

- Improve performance
- Service customer's needs
- Consistency
- Engage employees
- Reduce cost and increase profits

**Business
systems:
There's a tool
for that**

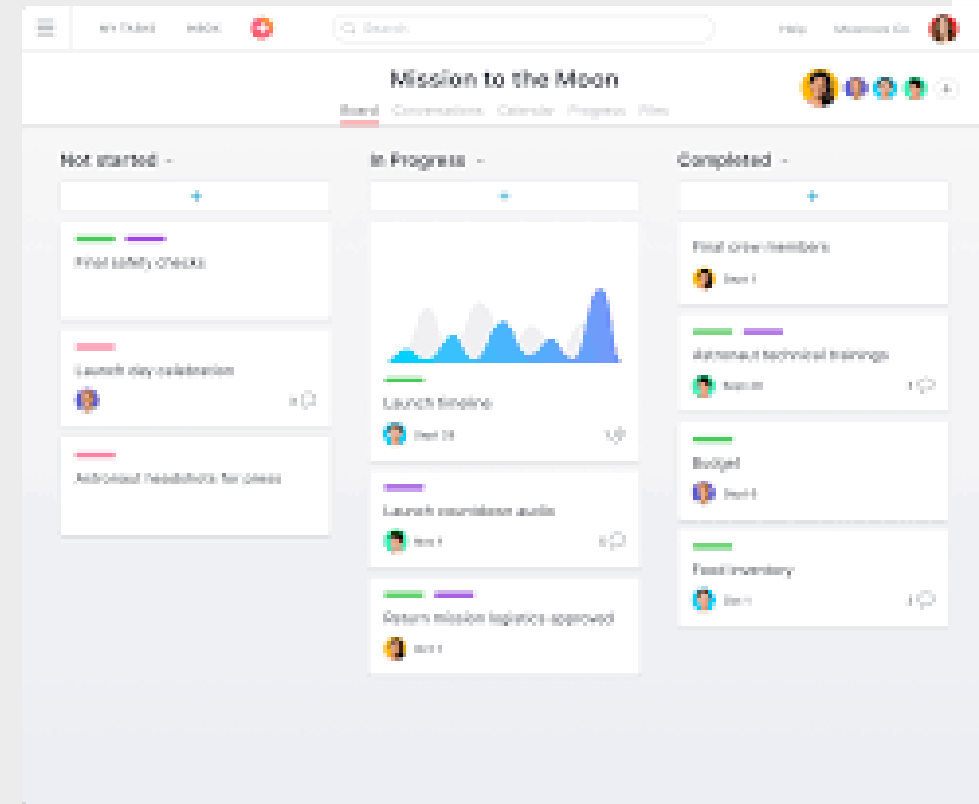


Business systems: Project management

Project management software can help teams manage projects and tasks in one tool. It allows owner to create projects, assign work to teammates, specify deadlines, and communicate about tasks directly.

Business systems: Project management

- Basecamp
- Asana
- Monday
- Trello



Creating a system for managing projects

Chef Asata Branding and Website ▼ i ☆ ○ Set status

Overview List **Board** Timeline Calendar Dashboard Messages Forms Files

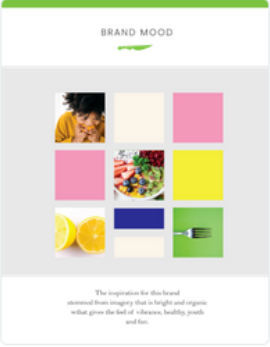
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Created on Oct 30, 2018 ⌂ All tasks ≡ Filter ↕ Sort ⊞ Customize ⋮


Task + ⋮ **In Progress** + ⋮ **In Review** + ⋮ **Complete** + ⋮ +

- ✓ Copy for website pages
- ✓ Wireframes for website
- ✓ Initial Design
- ✓ Project plan
- + Add task

In Progress

- 
✓ Brand Mood Board 👤 📅 👍 1 💬
- ✓ Business Card Copy
- + Add task

In Review

- ✓ Business card design
- 
✓ Logo Design 👍 9 💬
- + Add task

Complete

- ✓ Intake form
- + Add task

Sales/marketing funnel

PRE-QUALIFY



Initial consultation



Follow up conversation/Define work Proposal



Contract



Onboarding
Project plan/ deliverables defined

Project milestone



Project milestone



Project completion



Wrap up/evaluation

Prequalifying clients

- Saves you time money and headaches.
- Ensures client has realistic expectations, budgets and timeline.
- Determine if client's needs resonate with your business.

WAYS TO PREQUALIFY A CLIENT:

- Website form
- Questionnaire
- Initial conversation
- Transparent pricing

Prequalifying clients - checklist

- Project goals
- Measure of success
- Timeline
- Budget
- Final use/formats
- Expectations
- Concerns
- Aesthetic/style
- Technical features

What you should be listening for:

- Are they receptive and open to feedback?
- Are they a good match for your skills/talent?
- Do they fit your ideal client profile
- Can they articulate their needs
- Do they have a reasonable budget and expectations?

Business systems: Creating a winning proposal

- Clearly define problem
- Provide your solution
- Deliverables
Next steps:
payment
timeline
- High-level terms



Business systems: Contracts

You Always need a contract.

- Clearly define work
- Avoid misunderstandings
- Protect yourself legally
- Think through project

**Conflict-proof your
contract**

Business systems: Contracts

What to include:

- **Scope**
Exact work that will be done.
- **Schedule**
When will you start, what are the milestones and when will the work be complete.
- **Deliverables**
What you will turn over to the client and when (files, finished website, etc.).
- **Deposits and payment terms**
What is the payment schedule?
Are payments due on specific dates or at milestone completion? What is the deposit?
- **Work beyond scope**
How will you bill anything that is not defined as part of the work?

Business systems: Contracts

- **Expenses and incidentals**
How you will be for expenses including photography, images, software or fonts, travel and other out of pocket expenses; when will those be billed and who is responsible for charges.
- **Cancellation**
If client cancels what happens; If you cancel what happens.
- **'Force Majeure'**
Natural disaster and things beyond your control.
- **Non-responsiveness**
What happens if the client does not respond and what timeline?

Business systems: Payments

- Be clear about payment terms.
- Make sure you get a deposit in advance.
- Make it easy for clients to pay you.
- Never do work beyond what you are paid for.



Business systems: Project plan

- What will you deliver and when?
- What you need from clients?
- Order that work will be done in.
- Files to be supplied?
- Milestones
- Graphics to be supplied.

**Business
systems:**
**Client
agreements,
contracts
and
payments**

- Onboarding new clients
- Welcome kit/package
- Setting up project in project management system



Take-aways and action items

- Do you have a system for hiring and onboarding contractors and employers?
- Do you have a consistent way to manage client responses and client care.
- Does your lead generation system create sufficient sales opportunities?
- Do you have a reliable accounting system?