

# Deanna Maio Delegation & Automation Strategist

# DelegatedToDone.com

The Right Plan, Systems, & Team to Go from Delegated to Done!

#### **Resources From Delegated to Done**

**The Mechanics of Making More**. Free training detailing how to make a big impact and income with your business by building and leveraging technology, systems, a team of capable support professionals that have talent and share your vision for building your business and changing the world. <u>http://www.TheMechanicsofMakingMore.com</u>

**5** Simple Steps to Get Free Interns. Free training beginning with a 5-day email mini-course where Deanna takes you "behind the scenes" to see how interns are a great way to get important projects completed without payroll costs and help someone else reach their dreams and goals while you reach yours. <u>http://www.GetFreeHelpWithInterns.com</u>

The Delegated to Done Formula Learn how to give away free content to generate traffic to your website AND persuade people to buy your products. This is THE go-to training course on the subject. http://www.DelegatedtoDoneFormula.com

#### Introduction - Leveraging Technology to Streamline Your Business

The more efficient your business, the easier it is for you to create an entity that supports your vision for both your personal and professional life. Technology has long been used to help business owners maximize their time. In the old days it was the Franklin Planner. Today you no longer have to rely on your memory, or paper and pen, to get you through the day.

You can use technology to automate, communicate, and to create systems that require little (if any) input from you once they're set up. Depending on your business model, you may be able to automate more than half of your business. In fact, you may already be using many technologies to make your business more effective and efficient.

For example, do you have an email list? If you do and you use autoresponder and list management services then you're leveraging technology. The alternative is to manually add each request and send your messages to each person on your list, which probably seems silly and overly complicated.

#### Streamlining Means Simplifying

The truth is that there may be many tasks you're doing right now that are overly complicated. These same systems can be automated and made simpler with a few basic technologies. Now there is absolutely the risk of relying too much on technology or depersonalizing your business. This is why it's so important to establish your needs and goals and then find suitable technologies to get the job done.

#### The Legwork is Done for You

Rather than spending your time digging through the thousands of potential technologies to identify which ones might fit your needs, the legwork has been done for you. We've identified the best that technology has to offer busy and motivated entrepreneurs like you.

The applications covered in this eBook range from tools you can use to find top tier contractors to brainstorming tools. We'll look at apps to protect your information and to make communicating with your contractors quick and easy.

#### **Application Rundown**

Each application covered in this report has been chosen because of its ability to help you streamline your business systems, grow and manage your team, and accomplish more in less time. In addition to a basic description of the application, you'll learn why the application is on the top 10 list and

learn how you can use it to your advantage. You'll be able to quickly identify how to embrace each application and take the stress out of outsourcing and delegating.

Save time, money, and energy while growing your business. Our top 10 apps list means you'll be able to create a business that runs effectively and efficiently, leaving you time to be a business owner and to focus on your primary role of innovating, organizing, and leading.

#### 1. Fiverr for Finding Outsourcers for Small Projects Tasks



Fiverr is an online global marketplace where businesses needing work done can come together with service providers in the context of relatively small projects or microtasks. The name "Fiverr" comes from the fact that a majority of the tasks and services (also known on Fiverr as "gigs") that are offered on the site only cost five dollars.

Even though the focus is on microtasks, Fiverr may also be appropriate for larger transactions as well. Experienced providers have the opportunity to offer premium services, which means that you can request higher value tasks at a price point greater than the standard five dollar fee.

Fiverr uses a feedback system that makes it easier for you to find high quality and reliable assistance for various microtasks. The service providers (many of whom use Fiverr as their second or even primary source of income) know that by providing quality service they'll be better able to keep getting new projects.

Fiver may make good business sense for small but specialized one-time tasks, as well as for recurring work that you may have.

#### Small but Specialized Tasks

For example, let's say you have a few digital images that you want to use on your business website (or in a newsletter or some other piece of content that you wish to sell or give away as part of a promotion), but you'd like those images improved. If they are photographs of people, perhaps you want the skin tone evened out, or the "redeye" effect of flash photography corrected.

If you don't already know how to perform this work, there's a good chance you could teach yourself how to do so. But the process of acquiring that knowledge and doing the work might take you an hour or two (or perhaps more), and prevent you from completing other tasks on your to do

list. On the other hand, there are certain to be a number of different service providers on Fiverr who can do the task very quickly, at a cost of only five dollars.

#### **Recurring Tasks**

Fiverr can also be a great solution for various types of recurring tasks that you may have. For example, you might find that every month you survey various websites within your niche and collect the titles of the various articles they publish in order to come up with topic ideas for your own marketing content. This is exactly the type of straightforward task that many Fiverr contractors could handle on your behalf.

Because the five dollar fee is small, it's easy to take Fiverr (and its service providers) for a "test drive" on some of your less time-sensitive tasks, to see just how much value the service providers can create for you.

Assuming that a task on your to do list isn't one that has particular confidentiality or privacy concerns, it should be fairly easy for you to decide whether Fiverr makes sense for your business. Consider how long it would take you or one of your existing contractors or partners to complete that task, then ask yourself if it makes more financial sense to pay someone five dollars to do it instead.

## 2. <u>oDesk for Finding Outsourcers for Projects</u> <u>and Long Term Positions</u>



If Fiverr (with its focus on relatively small and self-contained "microtasks") represents one end of the outsourcing spectrum, then oDesk can be thought of as being closer to the other end of that spectrum.

oDesk is another global marketplace that seeks to match service providers with businesses that have jobs to be done, but the focus at oDesk is on higher value projects and potentially longerterm engagements. Think of oDesk as being a website that can help you find your next remote contractor or employee, rather than someone to do a quick "one off" task.

There are two basic ways to find a new contractor or employee on oDesk: posting a description of the job you need help with, and browsing the freelancer profiles to find someone you wish to contact directly.

#### Post a Job.

After you sign up for the oDesk service you can post a job summary as a "Public Post" that immediately becomes visible to all active freelancers in the work categories you choose for the task. Interested freelancers can then contact you in order to learn more.

Businesses can post their jobs at no cost, because oDesk collects their fees from the earnings of the contractors. This means that you'll be able to determine your budget for a particular project more easily, since you won't have to worry about paying any additional fees.

You can post your project as a "Public Post" (which we briefly described above), a "Private Invite" (which we'll discuss below), or a "Hybrid Post" (which combines the key features of the Public Post and the Private Invite).

#### Browse Freelancers.

You can also approach oDesk by browsing the profiles of the various freelancers in the work areas you choose. Each freelancer profile includes an overview that they prepare, and which generally includes a summary of their expertise and experience, and any other information they choose to provide.

The freelancer profile also provides a summary of the projects they previously worked on through oDesk (including the number of hours they worked on each project and their billing rate), as well as feedback (both written and numerical) that prior clients have given.

oDesk even goes a step further by administering their own expertise tests to freelancers who choose to take them. If you're on the fence about whether to hire a particular freelancer over another, this testing scheme may be just what you need to make your decision. Once you find an oDesk freelancer that you want to work with, you can send them a Private Invite about your project.

#### Project Management.

oDesk also provides you with functions to track your freelancer's progress, exchange messages and review the work as it happens, in order to make sure that all of your projects stay on track.

oDesk takes much of the uncertainty and fear out of bringing in a new freelancer because you'll be able to learn a lot about any prospective contractor before you actually begin working with them.

#### 3. LastPass for Password and Secure Data Management



How many times have you had to reset your password because you forgot it? Even worse, how many times have you been locked out of an account because you tried to log in unsuccessfully? And those are simple password problems to have compared to the difficulty of managing your privacy and protecting your data when you're working with contractors.

Contractors often need passwords and login information to be able to perform tasks within your various online business accounts. For example, your virtual assistant may need your WordPress login information in order to add a plugin or manage comments. Your accountant or bookkeeper may need to access your PayPal account and your Quicken records.

Handing over this information feels risky. Yes, for many systems you can create separate and unique passwords for contractors and limit their access. But there's still a risk and you don't have to look too long before you find a horror story about a dishonest employee.

#### LastPass Protects You and Lets You Focus on Productivity

LastPass is an application that can help you keep your information safe. LastPass has a password generator feature that lets you and your team members generate obscure passwords. The software remembers the password for you so you don't have to. You can actually establish the parameters for the passwords.

You can set password requirements based on a number of categories. You can also restrict access and create groups so that some password and access rules apply only to a small subgroup of your team. And if you only want to deal with one password you can use the "Master Pass" feature. This allows you or your employees to create one master password which they can use to access everything that you've given them permission for.

#### The Convenience of Organization

Rather than having to send and manage password information for a number of different sites, you and your team can use LastPass to create and store logon information for all those websites. You can actually preload the sites into your user account so all the password information is stored in one location. Your contractors never lose a password and you don't either.

Logins and notes can be shared with your team via folders, and it's quick and easy to add or delete someone from the system. When a project is complete and you're done working with that contractor you simply delete them from the account and they no longer have access to your information. It's that easy. LastPass offers a free trial and prices range from \$18 to \$48 annually per user.

#### 4. HelloSign for Online Document Signing



Tell me if this sounds familiar, or fun. You finally find the perfect contractors for your new website project. You have a writer, a designer, and a coding specialist to help bring it all together. You even have a virtual administrator to help manage some of the details for you. Of course, they all live far away. In fact, two of them don't live in the

same country as you.

You draft a contract for each new team member and drop them in the mail. Then you wait. And wait. And wait. You don't want to start the project without a signed agreement. That's smart.

However, you also don't want to push a project so close to your ideal delivery deadline that you have to pay your contractors extra to rush their work. It's an unfortunate problem that didn't have to happen.

#### HelloSign

HelloSign is an electric document signing application that allows you to create legally signed documents that are securely transmitted. Their electronic signature protocol is legal, complies with eSignature laws in the United States and Europe, and recognized in court, should your contractor relationship ever get to that point. Let's hope that it doesn't.

#### Fast and Secure

Instead of waiting for days or weeks to get your signed contracts back, you can have your contracts back in a matter of minutes. And you don't have to worry about security. They use 256 bit SSL, Secure Sockets Layer, and encryption. HelloSign hosted securely and they are ISO 27001 certified.

#### Fast, Easy, On the Go

HelloSign integrates with many of the applications you're probably already using. You can sign documents from Gmail and it HelloSignsyncs with Google Drive, Dropbox, Box, SkyDrive and Evernote. You can even save your most commonly used contractor or client agreements and reuse them.

With HelloSign mobile applications for iOS and Android, you can also sign contracts or send them from your mobile device too. There are two plans to choose from depending on your needs. There's a 30-day trial if you're on the fence.

#### 5. Evernote for data storage and sharing



Evernote is the premier productivity tool. It's used by business executives, owners and creative thinkers around the world. This simple yet comprehensive software allows you to do everything from make your weekly meal plan, so your family doesn't starve, to researching and planning your next product launch.

Evernote lets you collect all of the information, thoughts, and ideas you have in one place. You

can clip notes and images from your computer or the Internet. You can save web pages and share your information with others.

You might be thinking, "Well my computer lets me create folders where I put everything and I can bookmark web pages. And I can just email people with the information I want to share. What's the big deal?"

The difference is that Evernote provides effortless organization. You'll never spend an hour looking for a file or wondering where you put something. It's for people who love to be organized, and those who are organizationally challenged and let's face it, most of us could use a little help in the organization department.

Plus, when you send an email to someone you never really know if they received it. With Evernote, you have 100% assurance that all relevant information is at their fingertips. Your collaborators and team members don't have to sort through their junk email box to find a missing message.

When it comes to running a business and keeping your team on track, Evernote allows you to share your notes (only the ones you want to share) with your team. It provides the best of what technology has to offer in terms of:

#### Collaboration and Knowledge Sharing

Let's face it, you can't read minds and your team members probably know more about some things than you do. It's why you chose them. Likewise, you have specialized knowledge to share with them. Evernote makes it easy for team members to share information and knowledge with one another. Use it to collaborate or to simply keep everyone informed.

#### **Connectivity and Productivity**

In this global marketplace you can easily have contractors in five different time zones. Whew, isn't it fun to try to schedule a conference call when that happens? Evernote allows your entire team to stay connected and productive regardless of the location someone is working in.

You work best in the mornings, great! Everything that was accomplished and shared overnight will be ready and waiting for you. Likewise, everything you manage to accomplish in the morning will be waiting for your night owls to access.

Finally, let's be honest and say that if there's a steep learning curve for any software not only are you not going to use it, you can't expect your team to figure it out. Evernote is easy. Once you download the free (yes it's free) software you can create a note, create a notebook, and start sharing. There's very little to "figure out." It's all fairly intuitive.

### 6. Teamwork for Project and Task Management



Writers, designers, editors, and administrators all play an important role in business projects and ongoing business systems and processes. When a business starts growing it can be a full time job trying to keep all of the contractors on schedule and informed.

If communication and organization gets out of

control you can miss launch deadlines, lose prospects, and disappoint clients. None of that is helpful or good at reducing your stress – like you need more stress. And managing all of those contractors can consume all of the time you thought you were going to save by hiring them in the

first place.

This is where an application like Teamwork can become your best friend.Teamwork is an online project management tool that allows you to create and track projects and communication.

#### Know What's Going on with All Your Projects

Teamwork allows you to view all of your projects at once, or to zoom in and view the status and activities related to a single project. You can set deadlines for projects and create milestones to help keep contractors and projects on track.

#### Task Lists

Unlike many project management applications, Teamwork allows you to create task lists for any given day, project, or person. In fact, you can set due dates for tasks, add an estimated completion time for a task (helpful if you're being charged by the hour) and you can also assign tasks to one or more people.

Files can be attached to tasks, and to projects, and you can set reminders. Your assigned team members can log time against a task, which helps them track their time and bill you accordingly.

#### Communication

One of the challenges to managing multiple contractors and projects is that communication can become confusing and messages can get lost. Teamwork allows you to streamline communication by keeping all your messages in one place. You can notify everyone on a project or keep some messages private. You can also attach files to messages, send automatic email reminders, and track progress. User settings and permissions can be changed quickly and easily as well.

Teamwork is available as an online application. There are five pricing levels depending on the number of projects you have and the amount of file storage you need. Intermediate and advanced levels also offer integration with Google Drive, Box.com, Dropbox and a Custom Domain. You can also access your Teamwork account via mobile application for iOS and Android operating systems.

#### 8. LucidChart for Mapping Processes and Systems



Are you a visual thinker? Do you find that your plans and thoughts are better organized when you can draw them out or create a mind map? LucidChart is an online chart creation tool that lets you create just about any type of flow chart or mind map that you need.

You can create organizational charts, plan the action steps for your next product or service launch, or outline your new website design. Best of all, LucidChart gives you a link so you can send the chart to your team members for their input.

#### Work Together In Real Time

Lucid chart allows several people to work together on a chart at the same time. Changes are made real time, which means you don't have to wait to receive the thoughts and ideas of your team members. You can see what they're suggesting right away.

#### **Publish and Share**

When you've finished pulling together all of the pieces of your chart, you can then save it and publish it as PDF or image. You can share it with your team. For example, you can create a flowchart that outlines your standard operating procedure (SOP) for a customer inquiry. If you outsource your customer service or client management tasks, then you can include this flow chart in your documentation to your contractor.

LucidChart makes planning and communicating with your contractors and employees much easier. It also helps visual thinkers and visual learners gain a deeper understanding of processes and expectations.

Finally, because no one likes to have read a manual to learn how to use a software product, you'll be glad to know that LucidChart is a drag and drop program. It's super easy to use. In fact, it's so straight forward they let you create a free chart just to see how powerful this simple tool can be.

They offer several versions so you can choose the one that's best suited for you and your company needs. Sign up for free and take advantage of their trial period. If you're a mobile application user then you'll enjoy using the LucidChart applications for iOS or Android.

#### 9. Jing for sharing screenshots and training videos



One of the most interesting challenges of hiring freelancers and service providers is trying to explain what you want and need from them. This becomes increasingly difficult if there is a language barrier, as may be the case if you're hiring a contractor that lives in a different country and may not have English as their first language. If you're dealing with time

zone differences then that only adds to the challenge.

#### A Picture is Worth a 1000 Words

Jing is a free software program by Techsmith. They're the lovely folks who created free video and video editing tools like Camtasia, Coach's Eye, and Snaglt. Jing allows you to instantly capture images and videos. You can then share those images with others to help you communicate with contractors, interns, and employees.

#### **Standard Operating Procedures**

Whether they're documented or not, you have SOPs (or standard operating procedures) that you follow throughout your day. For example, when you have to publish a blog post, what steps do you follow to make it happen? What happens between you opening your browser to the point where you click "Publish"?

You probably manage all of those steps without thinking. Yet, if you have to suddenly walk someone through the process it can be challenging. You might miss a few steps or they could easily misunderstand you.

Jing helps you add visual elements to your SOPs so that you can be more confident that your contractors understand what's expected of them. You can literally take a screen shot or a short video of every step of the process. Add text to help explain the step and voila! You have a clear and complete document that anyone can understand.

#### Sharing

Simply creating the image or taking the video isn't enough. You want to be able to easily share them with key people. It's also important to be able to store them safely so that you can reuse the

images later, if you need them. Once you've created your Jing image or video you can then upload it to Screencast.com and share through IM, email, or social media.

Jing allows you to take that extra step to add clarity and quality to your project descriptions, contractor documentation and more. It's one more tool in your box of technology that you can leverage to create a dream team and a dream business.

#### 10. Join.me for Screen Sharing



Sometimes documentation isn't enough to help your team get a clear picture of what you want or need. And sometimes you need everyone to be able to communicate and collaborate in real time. Join.Me is a free application that lets you get the job done quickly and effectively.

Join.me is a meeting tool first and foremost. With the free version you can connect up to 10 people for an instant online meeting. Using Internet calling everyone at the meeting can chat and share their relevant thoughts and knowledge.

It also allows users to share images on their computer screen and to share files. With the paid Enterprise version you can manage privacy and permissions. The free version gives everyone the ability to share and contribute to the conversation.

You can use Join.Me for a number of team building and project management functions. For example, at the beginning of a project you might pull everyone together online via Join.Me to discuss deadlines, tasks, and answer questions.

Rather than having a separate meeting with everyone and spending countless hours answering questions, you can meet with everyone and get more accomplished. You can show all providers how to access the sites and technologies they'll need, and you can show them how to use your project management site by walking through the steps while you're meeting online. It's not only a useful collaboration tool; it's a powerful training tool as well.

#### BONUS. Ontraport



Ontraport, formerly known as Office AutoPilot is an all-in-one integrated platform that delivers essential business features, including a powerful CRM system, membership sites, oneclick WordPress hosting, outstanding email delivery, payment processing, direct-mail printing, affiliate management, and an

innovative business automation suite. With it you can totally automate process in your business including assigning tasks to you team that are triggered based on customer or prospect actions. With Ontraport You Can:

- Automate marketing, sales and business tasks
- Manage your contacts in one central system
- Email, SMS, take payments online, launch a website and more...
- Track your marketing and see ROI

Ontraport was created to solve challenges faced by small and mid-sized companies:

- to deliver automated multi-media, multi-step, integrated marketing sequences.
- to see what was working and what wasn't at every stage of the marketing/sales process.
- salespeople to actually use the CRM
- to streamline and automate recurring business processes
- to assign work to a real person automatically as a part of a regular process like when a client signs up or some has a request for help

And if you don't feel like you're ready for all the features that Ontraport has to offer, you can get started and then upgrade as you're ready with their "little brother" product, <u>SendPepper</u>. Starting at just \$30 a month with excellent email deliverability, sequences, postcards and more, it's a great way to start automating without the full feature set of Ontraport.

#### What Would You Do With More Time?

If you're the motivated entrepreneur I think you are, you'll use at least half of ANY reclaimed time to grow your business. You'll find time to step back into the role of innovator, organizer, and leader of

your business. You'll be able to spend more time on profit-generating tasks, and you'll have the freedom to brainstorm and implement new business models.

You probably have tons of ideas on how to add cash flow and revenue streams to your business, but no time to see them through. The applications discussed in this report are the first step to streamlining your business and creating the additional time you need.

#### A Balanced Life is a Happy Life

What will you do with the other half of the hundreds of hours you'll save each year? Hopefully, you'll spend it with friends and family, and pursuing personal interests. After all, what good is a seven figure income if you don't make the time to enjoy it? The ten applications shared in this guidebook – and the next steps you're about to take – will bring you to the next level of your business and your life.

#### The Next Steps...

From brainstorming to identifying contractors, we've covered the best applications to make streamlining your business not only a possibility, but a reality. Each application will take you one step closer to a fully efficient business.

The next step is for you to begin identifying your current systems and taking steps to make them more powerful. How do you do that? Take a look at each of the areas of your business – from marketing to fulfillment and everything in between.

#### Identify and Map Your Processes

Identify each system that you have and create a map for it. Assess where you can simplify the system. Can you use technology to streamline? Can you outsource and delegate the process to someone? While this step may take a little time, in the long run it will save you hundreds of hours annually.

#### Delegate It Out!

Once you have your daily processes mapped out, it makes them much easier to hand over to outside help. The more systems you can put into place and take off your own hands, the more productive you will become in the places that really matter... like creating the things that make money!

#### I Can Show You How In 5 Steps

I know that trying to delegate your work out to other people can be a troublesome idea. Even if you've tried it before, you might have found it frustrating and possibly even thought it was a waste of time and money. Either way, I know how you feel and I've seen it many times before. Over the past 5 years, I have taught hundreds of business owners, just like yourself, how to grow their businesses by "systemizing" and building high performance teams. During that time, I created a 5-step formula to help my clients grow their businesses to where they always wanted— and *beyond*!

#### Learn How You Can Too - For FREE

It doesn't matter if you're starting from scratch or already have a team in place, your business **WILL** benefit from these 5 steps. In this free training, I'll also show you the 4 key areas of your business you need streamlined before anything else... *Plus*, 2 "no-cost" strategies you can use for training team members and to "systemize" your current business operations <u>in less than 5 minutes</u>.

If you are ready to take the streamlining of your business beyond software applications and onto the fast-lane of growth, **click the link below and learn...** 

## http://www.TheMechanicsofMakingMore.com/Top10Apps

