

Business Bait: How to Land Trophy Clients™

Processes, Fulfillment & Outsourcing
with Lisa Parziale & Mark Allan Nielsen

www.trophyclients.com

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Business Bait
How To Land Trophy Clients™



Creating Scalable Processes

- Defining scalability
- Why you need scalable processes
- The processes to focus on
 - Lead generation
 - Client acquisition
 - Fulfillment
 - Staff / contractor management
 - Client satisfaction



Processes simplify your business
NOT MAKE IT HARDER!



It's All About Process

Outlining your process

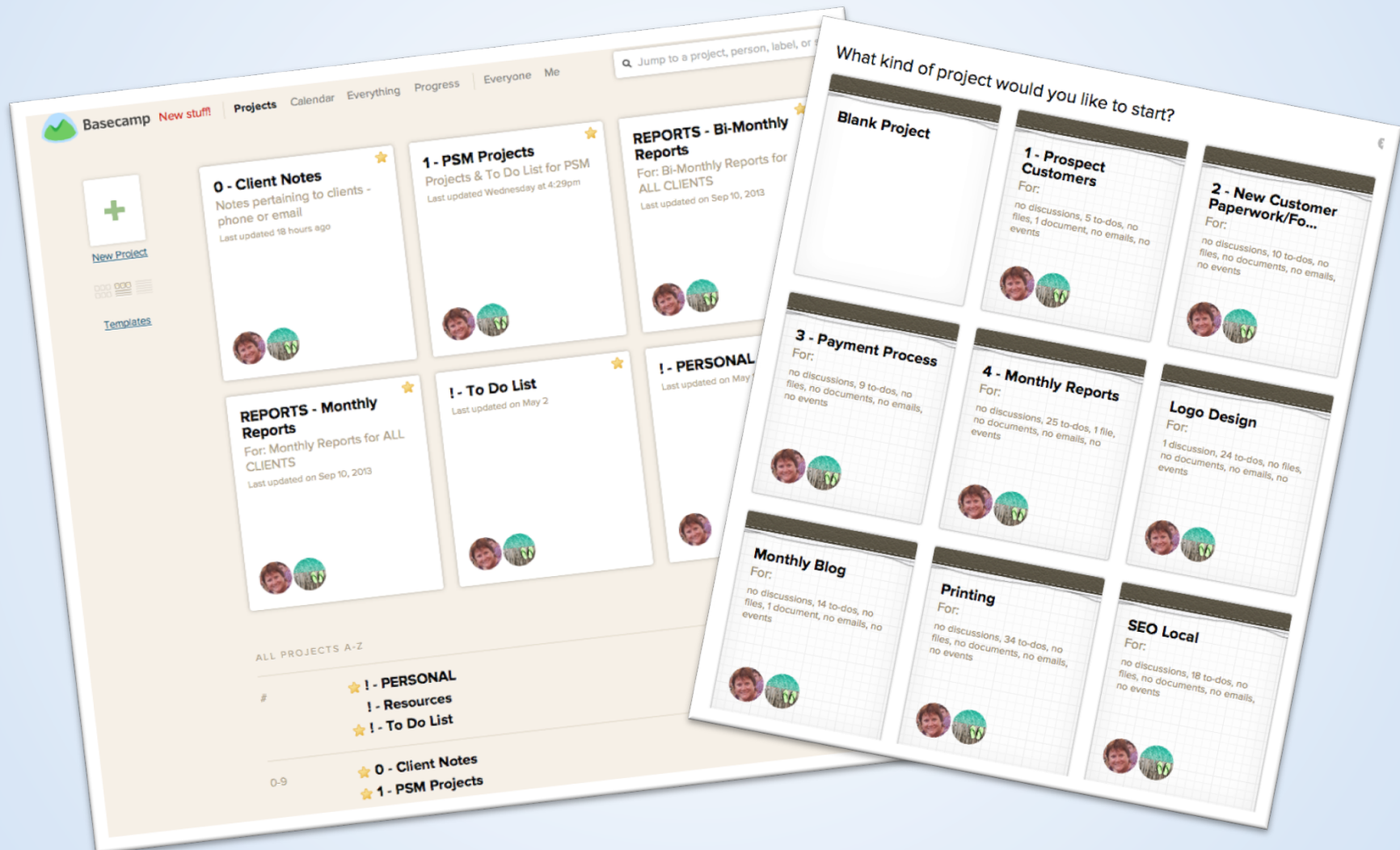
- Identify all tasks associated with a process
- Streamline processes that make sense
- Create documented steps for each task
- Create checks & balances for all tasks
- Tasks should be easily duplicated
- Create process maps where appropriate
- Review processes frequently



Too Many Services & Products Are Difficult to Scale



Project Management



Process Checklists

The image displays two overlapping screenshots of a project management web application. The top screenshot is titled 'Logo Design' and shows a 'To-do lists' section with a checklist for 'Project Paperwork'. The bottom screenshot is titled '2 - New Customer Paperwork/Followup' and shows a 'To-do lists' section with a checklist for 'Paperwork to send' and 'Paperwork Received'. Both screenshots include a 'Latest project updates' section and a 'Discussions' section.

Logo Design

For: [Rename project](#) or [Cancel](#) [Add the first: File Text document](#)

[1 Discussion](#) [24 To-dos](#) [Events](#)

Latest project updates

10:43am You added a to-do: [Assign logo to developer](#)
10:43am You added a to-do: [Review discovery form](#)
10:43am You added a to-do: [Discovery form received completed](#)

[See all updates](#)

Discussions [Post a new message](#)

[Lisa P.](#) [Design initial mockups per project specs](#) - Review discovery form attached questions, please let us know. Otherwise, please begin designing initial mockups.

To-do lists [Add a to-do list](#)

Project Paperwork

- ☐ Discovery form sent to customer
- ☐ Discovery form received completed
- ☐ Review discovery form
- ☐ Assign logo to developer

[Add a to-do](#)

Check List to Design Logo

- ☐ Design initial mockups per project specs [1 comment](#)
- ☐ Initial mockups complete
- ☐ Reviewed & approved to send to customer
- ☐ Sent to customer for review
- ☐ Receive feedback from customer
- ☐ Implement feedback
- ☐ Sent to customer for 2nd review
- ☐ Receive feedback from customer
- ☐ Implement feedback
- ☐ Sent to customer for 3rd and final review
- ☐ Receive feedback from customer
- ☐ Implement feedback and finalize design
- ☐ Send to customer for final approval
- ☐ Approved by customer
- ☐ Package logo for customer delivery
- ☐ Logo tear sheet created

[Add a to-do](#)

Logo Completion

- ☐ Package loaded to client site or location on PSM servers
- ☐ Final logo put on PSM website
- ☐ Pin logo to Pinterest Site
- ☐ Case study created for website blog

[Add a to-do](#)

2 - New Customer Paperwork/Followup

For: [Rename project](#) or [Cancel](#) [Add the first: Discussion File Text document](#)

[10 To-dos](#) [Events](#) [Invite more people](#) [Catch up](#)
2 people on this project on recent changes

Latest project updates

10:46am You added a to-do: [Credit Card Information](#)
10:46am Collette S. added a to-do: [Web Discovery](#)
10:46am Collette S. added a to-do: [Logo Discovery](#)

[See all updates](#)

To-do lists [Add a to-do list](#)

Paperwork to send

- ☐ Contract for design
- ☐ Payment contract
- ☐ Logo Discovery
- ☐ Web Discovery
- ☐ Credit Card Information

[Add a to-do](#)

Paperwork Received

- ☐ Contract for design
- ☐ Payment contract
- ☐ Logo Discovery
- ☐ Web Discovery
- ☐ Credit Card Information

[Add a to-do](#)

[Watch a quick video about To-Do Lists](#)



In-Sourcing & Out-Sourcing

Standard In-Sourcing (doing within)

- Hire part-time or full-time staff
- Hire contractors
- Hire a service provider

Standard Out-Sourcing Models

- White Label Agreements
- Partnership & Referrals



Hiring Permanent Staff

- How it works:

- You hire a part-time or full-time person to work within your company
- You tell employee when and where to work
- You pay based on hours worked
- Federal and state laws apply

Things to consider:

- Taxes, Medicare, SS (up to 40% of salary)
- Workers compensation
- Office space
- Sick & vacation time
- Need to have enough work to fill hours
- Management of staff



Hiring Contractors

- How it works:

- You hire a contractor to work on specific tasks
- You DON'T tell employee when and where to work
- You pay based on agreed amount for project or task
- Federal and state laws apply

Things to consider:

- Project fee is typically only cost
- Most contractors will work with others
- Ensuring project is delivered on time
- Amount of work contractor can handle



Hiring Service Providers

- How it works:

- You hire a company to work on specific projects or tasks
- You pay based on agreed amount for project or task
- You have no control over workers or schedules

Things to consider:

- Project fee is typically only cost
- Not getting same person on project each time
- Fees typically higher
- You should not have to manage much
- Good agreement in place



White Label Agreements

- How it works:

- You sell the service as if YOU will be doing it
- You use a service provider to fulfill
- Client does not know the service provider exists
- You make a profit but only manage the client, not the work (in theory)

Things to consider:

- You take all the risk
- Your reputation is on the line
- If the service provider screws up, YOU are the one the client comes to
- You lose control of the processes in most cases



Partnerships & Referrals

- How it works:

- You find trusted partners to deliver the products you do not
- Make the introduction
- Collect referral fees
- Partner takes over and provides all work
- No management on your side

Things to consider:

- Find a partner you trust
- Outline fees up front
- Agree on what the partner should or should not offer the client
- Understand they are now THEIR client
- Check in with the client often

*Adhere to state and local laws in regards to referral fees (kickbacks)



Use Any Combination
**A blend is often the best
choice for most companies**



Finding Good People

Permanent Staff

- Hire based on core values of company
- Hire slowly to get the right fit
- Hire folks that get along with you and staff
- Fire quickly if not working out
- Don't hire friends/family

Contractors

- Look for contractors that specialize in your needs
- Require a portfolio or proof of skills
- Pay more for seasoned pros over newbies
- Fill their calendar when possible (so they don't go looking)



Finding Outsourcers

Individuals

- Look for excellent ratings or comments
- Ask for references
- Give small tasks to test before big jobs
- Compare 4-5 at once
- Be specific & direct
- You get what you pay for

Service Providers

- Understand what they provide
- Know exactly what you are paying for
- Ask for examples and references
- Give small projects to test before big ones
- Again, you get what you pay for



Managing People & Work
**Takes AWAY from YOUR
sales and growth!**

Hire KEY people and only
manage them!



Outsource Solutions

OUR **DFY** SERVICES:

- Content Marketing
 - Blog Articles
 - Press Releases
 - EBooks / White Papers
- Website Development
 - Standard websites
 - Ecommerce websites
 - Blogs
- Print Marketing
 - Standard printing
 - Marketing campaigns
 - For your company
 - For your clients
- Other resources
 - oDesk www.odesk.com
 - Guru www.guru.com



Don't want to do it yourself?
We offer this service as a DFY service.





ACTION ITEMS

1. Define your core values
2. Establish & document your processes
3. Begin looking for strategic staffing or outsourcers
4. Implement this training!



SUGGESTED VIDEOS

1. VIDEO: How to find the best contractors on oDesk or Guru



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Attract the right clients to build a scalable, sustainable business.

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