Marketing Strategy 65: Form Letters

In today's lesson, I want to talk to you about a simple way to make your business run more smoothly.

This method requires a little bit of work upfront, but the payoff in terms of time saved is huge.

Even more important, it allows you to automate your business, so if you are sick or on holidays, your employees can keep everything ticking along without you.

What is this method?

Creating a form and procedures file

A form and procedures file is a set of folders on your computer where the templates for marketing and client fulfillment materials are saved.

So for example, if you are using the strategy for follow up that I told you about in another lesson, you would have a folder called 'Follow Up Calls'…

In this 'Follow Up Calls' folder, you would save:

A - The steps to follow for each follow up call. These steps should be so simple that employees can understand them even if you're not there.

B- Templates of the letters, voicemail messages and marketing materials needed for this process. These templates should be designed so that any employee can fill in the blanks.

Having organised and easy to follow systems will allow you to grow your business rapidly when you get more clients.

One way to think about this is…

- Amateurs *think* about following systems when they need to, and sometimes even think they are good at it.

- Professionals *always* follow system and use of *tools* to make following up easier. They understand that consistency is the key to success.

TODAY'S TASK: Start Systemising

1. Set up a folder called Systems. I recommend using Google Drive because it's cost effective, you can edit documents and you can share the folder with your team.

2. In the Systems folder, create Process folders. For example, create a Process folder called Client Starter Kits. Inside this folder, save everything that you include in these kits as well as instructions for employees about how to use them.

3. Add new Process folders for different strategies. Whenever you start using a new strategy consistently, create a Process folder for it. But only do this after you check that the strategy works for your business.