

Systems Checklist

Do you have these necessary items in place in your business?

Scheduling Tool - Acuity Scheduling

- Tired of emails back and forth trying to get a meeting scheduled with a contact and not ready to hire an assistant? You can still outsource your scheduling! Sign up for Acuity and automate your calendar.



Cloud File Storage - Google Drive

- Store all of your files in one place that you can access on many devices. Google Drive can hold various document types and can be organized to not only hold your files, but also allow you to share them with people as needed. Make sure you also have a designated file naming convention so that you (and everyone on your team) can put your hands on files easily.



Team Email - GSuite

- Yes, I'm a major GSuite fan. I love the control it gives for the admin to manage email addresses for the team. You can have aliases going to email addresses (like hello@yourdomain.com) that can be published but they can also flow into the same email box as name@yourdomain.com.



Email Marketing - ConvertKit

- ConvertKit isn't the cheapest option out there but the features it offers are the reason why. Maintain one email list with the ability to tag people to receive specific mailings relevant to them. They've also released a free version with a few less features but great to start with.



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Project/Task Manager - Asana

- Asana is your go-to tool for keeping track of project progress and tasks that need to get done. You can use the phone app or website to add things to your list or check the progress of something a team member is working on.



Team/Client Meetings - Zoom

- It's true, Zoom has had some challenges this year with the increase in business they've received but they're still the best option I've used for meetings. They have tools to make meetings fun and more interactive, recording capability, and they just get the job done. Link up your Zoom account with Acuity and you've got Zoom meetings scheduled without checking your calendar or creating a meeting and sending the link. Completely DONE FOR YOU!



Social Media Scheduling - HootSuite

- I don't know about you but I don't want to spend a lot of time on social media so anything that helps me do what I need to do and get off of it is a winner. Batch your content and schedule your social media posts with HootSuite. You could have your social media content done for the whole month in one shot and ready to drip out each day!



Notetaking System - Rocketbook

- I love writing things down! I process and remember things better if I actually write it instead of type. I have been using Rocketbook notebooks to give me that ability to write but also keep the pages electronically. I also feel great about all the used paper I won't be throwing away anymore.



Schedule a call and find out how I can help you integrate these tools and many others into your business at chiquitajonesvirtual.com