

# The Systems Chick's Guide to

Transforming

**BUSYNESS**



Into

**BUSINESS**



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## FALL BACK IN LOVE WITH YOUR BUSINESS, INCREASE YOUR REVENUE & ENJOY YOUR LIFE... SYSTEMS CHICK TO YOUR RESCUE!

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### WELCOME!

I'm so excited for you.

You're entering into an amazing adventure that empowers you to make quantum leaps forward in your business.

In this special guide, I'm sharing with you my unique, proven approach for overcoming the feeling of being overwhelmed by the BIG demands running a small business places on your time and energy. . .the pain of being pulled in so many directions because every little detail matters and seems like a top priority.

You might identify with some of the ways this core challenge manifests itself:

*"I was spending countless hours doing things that should have taken much less time and had nothing to show for it." Gennia Holder*

*"I felt busy all the time doing busy work and wasn't getting anything done. It would cause anxiety and overwhelm and all those other feelings that one doesn't want to feel." Nicole Jardim*

*"I had a huge to-do list for my business that left me feeling completely overwhelmed." Victoria Volk*

*"I was struggling with a backlog of work and from inefficient business processes that were draining my time and resources." Nina Vucetic*



In just a few sessions, I helped these creative, talented entrepreneurs optimize their systems and fall back in love with their businesses.

Your own transformation might involve overcoming the awful grip of procrastination that prevents you from taking care of a backlog of necessary tasks and projects,

discovering innovative time-management and productivity strategies to manage your projects and priorities, and streamlining your procedures.



You want to feel like Lisa, who started “finding more time” to be with her “family and even going out” with her “friends again.” Or like Helen, who “felt a renewed sense of excitement and invigoration about [her] business.” Or like Nina, who “was able to focus on actually building [her] business and generating income and clients.” Or like Jenn, who “added several thousands of dollars to [her] bottom line.”



I know you're ready.

That's why I created this free guide.

As your personal superhero, I'm going to help you establish a rock-solid foundation—with greater internal and external structure—and clarity about every area of your business.

The flexible systems you'll be creating can increase your revenue and allow your creativity to thrive.

Along the way, you'll find that your day-to-day schedule is simplified and generates a sense of exciting yet easeful flow, which enables you to take care of everything while also enjoying your life!

So here we go! Let's transform all that busyness into truly gratifying business!

Best,

Natasha  
(aka the Systems Chick)

*Natasha*





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## CREATING EASE, FLOW, & REVENUE BY OPTIMIZING SYSTEMS FOR THESE 5 MAIN AREAS OF YOUR BUSINESS

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### ZOOMING IN!

Now that you've got a clear picture of your business, it's time to zero in on the 5 most important areas all small business owners need to systematize in order to overcome overwhelming, chaotic busyness.



- 1 Marketing**, which includes lead generation, trust building, referral partnerships, and relationship building.
- 2 Client Management**, especially lead management, client intake, client service experience, and keeping in touch after the service.
- 3 Project Management** to make projects happen on time and budget, team building and collaboration.
- 4 Administration**, which focuses on internal operations.
- 5 Financial Information**, mainly invoicing, bookkeeping, and accounting.

## ***Where should you start?***

I'm not going to try to fool you.

These five areas are major.

If you're ready to finally take control over one or more of them so that you're no longer pulling out your hair when trying to launch a project (into which you've poured your expertise, heart, and soul) or crying late at night when you realize you're not raking in sales through your marketing,

I'm going to use some case studies to show you how you can create and streamline these systems.

But a lot of my clients find it really useful to begin by making small changes they know can bring about significant results.

Here's what Jennifer B. Bernstein says about resolving the seemingly small issue of scheduling by switching to the right software.



[Click here to watch Jenn's video testimonial](#)

***Small wins are exciting and inspire you to tackle the larger projects.***

## Sane, Simple and Successful Marketing Systems

Marketing is everything you do to build awareness about your services in order to fill your client pipeline and ensure it never dries up. However, making marketing your central business activity and implementing a million different tactics at the same time will result in nothing but exhaustion and overwhelm. So, be wise when selecting what to concentrate your efforts on.

You start with building buzz about what you do and triggering interest for your services ([lead generation](#)). Then you proceed to building a community of people, [who believe in what you believe](#) and, at some point, are ready to buy from you. As your following grows bigger and bigger, you allocate time to nurturing those relationships as these are the ones, ultimately, that generate most revenue ([link to the post about referrals](#)).

### ***You know your marketing systems need attention when:***

- ✓ You don't have enough clients.
- ✓ You're overwhelmed by all marketing strategies you have in place (or that you hear other people talking about).
- ✓ You can't find time for consistent outreach.
- ✓ There's no consistent inflow of clients: you get clients when you make a push to find some, but then you put your time towards servicing those clients, so once those commitments are over, you are back at square one, having to find clients again.

### case study

#### ***Anne's New System for Growing her Network:***

*Anne is a holistic personal trainer, body worker and movement therapist. She recently created a program aimed at helping people relieve pain and increase their energy with holistic movement and exercise. Her challenge is to stand out in a crowded marketplace. She also wants to bring her program to a larger audience by finding more clients and opportunities for joint ventures.*

Read on to have a look at the System we created for Anne.



# growing your network

build new relationships

nurture existing relationships

hang out

share WHO you know

share WHAT you know

show you CARE

introduce people in your network to each other

share relevant information (resources, articles, books)

send a card, congratulate an achievement, check in

strategically make new connections

create a follow up schedule

socialize and express a genuine interest in people

use a CRM system to keep in touch



## growing your network



### 1. People to Reach Out to:

- Potential clients
- Influencers (industry/thought leaders)
- Friends



### 2. Actions to Take:

- Introduce yourself to someone you don't know, but who'd be a great addition to your network.
- Introduce two people in your network to each other.
- Share valuable information with someone you know.
- Get in touch with someone you care about--send a card, a little gift, or just "thinking of you" note.
- Check in with people already in your network--comment on a blog or leave a remark on their social media profile.

As you can see, the system we created for Anne allows her to focus on **specific activities** and gives her a **clear, easy list** of daily actions that is strategically designed to help her reach her specific goals.

In Anne's  
words

*"Using Natasha's system has infused me with hope and confidence for the future of my business. Not only is it a perfect fit for me as someone who loves meeting new people but is easily side-tracked, it helps me recognize that every one of my interactions offers tremendous value and potential. I've already identified several ideal candidates for partnerships - they were in my network the whole time, but it took Natasha's program to get me to notice them!"*

***Ready to fall in love with marketing and have a steady flow of clients?  
Want to get attention you and your offerings truly deserve?  
[Work With Me](#)***

## Come On Get Happy: Client Management Systems for Amazing, Satisfied Customers

Once you've established trust with your audience, those who are ready will take you up on your offers. Creating [the most amazing experience](#) for your client from the point they say yes to your last official follow up will leave you energized and them so happy that they'll be referring your services to every person they talk to.

Though your clients might have different needs, finding a way to serve them in an easily manageable and uniform way is the key not to getting overwhelmed by the new business.

Building your relationships with people who might refer business to you is the next level of keeping the [pipeline of your active clients always full](#).

### ***You know your client management systems need attention when:***

- ✓ There's interest in your services, but leads aren't converting into clients.
- ✓ It takes you forever to create a proposal for a new client and collect all the necessary information you need.
- ✓ Many client projects go well beyond the scope you initially agreed on.
- ✓ You tend to get "difficult" clients.
- ✓ You rarely keep in touch with your past clients, because by the time you are done working with them you feel exhausted from having given them more time than you had and are happy it's over.

### case study

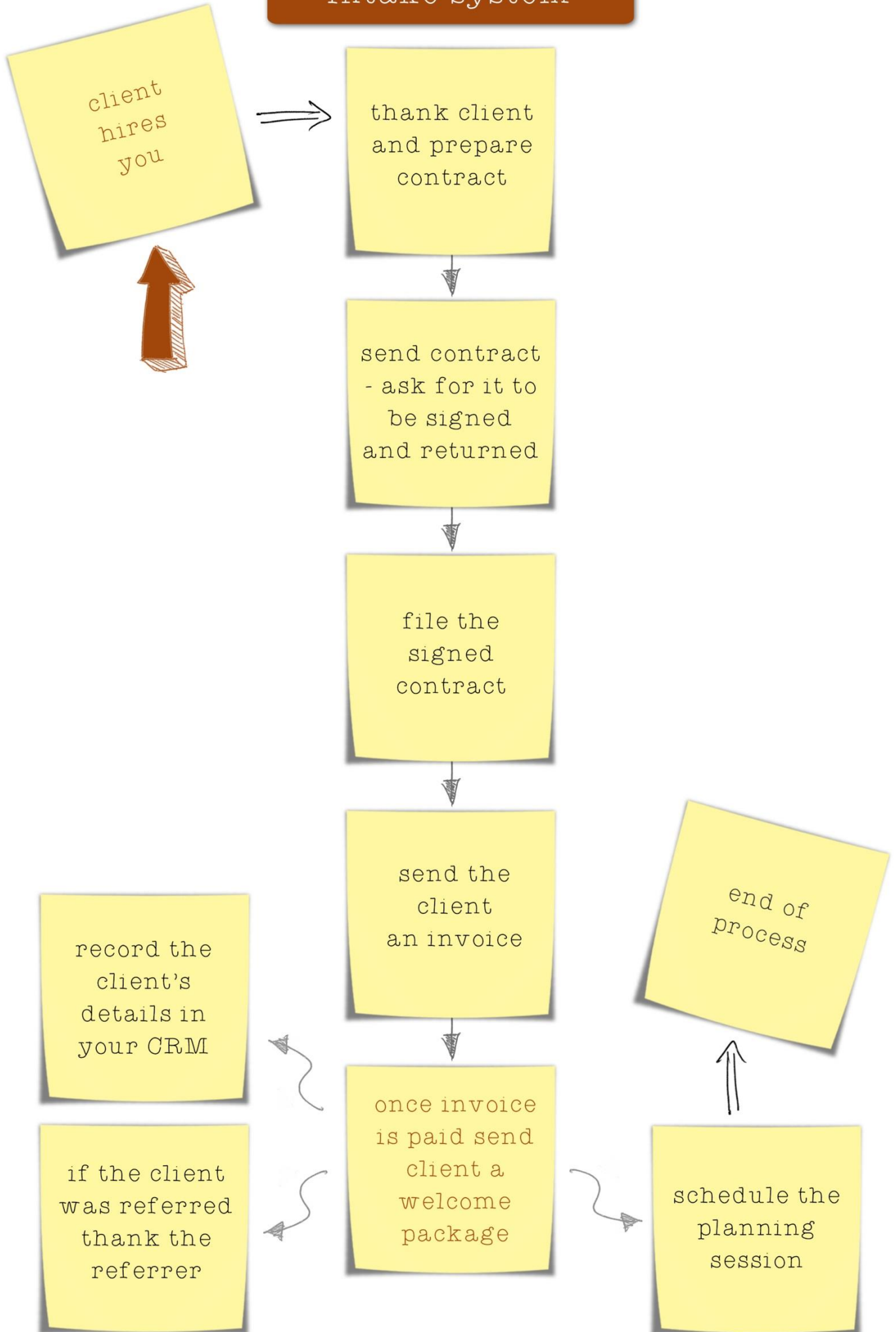
#### ***Gennia's New Client Intake System:***

*Gennia is social media marketing consultant and coach. In Gennia's words:*

*"I recently changed the type of services that I offer and needed to create a new Client Intake System (revamp/create forms and templates, change wording, etc.). I knew what I was doing from client to client, but since there was no system in place, I felt like I was all over the place. There was the catch-22 of knowing I needed to create a system to smoothly take on new clients while running my business. The challenge was finding the time, energy and structure to put it all together. Whenever I worked on it, it left me frustrated and overwhelmed. One of my biggest headaches was putting proposals together. I came up with a few versions, but none of them seemed right for me. I was spending a ridiculous amount of time putting one together."*

Take a look at the Client Intake System we created for Gennia.

# new client intake system



Notice how the new system gives Gennia an **easy-to-follow** list of steps she needs to take every time she books new business. Going through that list and checking off the items ensures that nothing is missed and the client is supported in the best possible way.

### In Gennia's words

*"The first time I put a proposal together after working with Natasha, it was a breeze. Unbelievable!! I should have hired Natasha the first day I started my business. What's priceless to me is speaking to a client and feeling totally comfortable through the process of making sure they know what to expect before, during and after they hire me.*

*I gained more than a Client Intake System. What I was missing was confidence. As a business owner, I wear a lot of hats and things can fall through the cracks. I was wasting time and passing up opportunities to take on new clients and grow my business, afraid I would forget something. I approached Natasha looking to develop a documented system and a process to guide my clients logically and in a professional manner. And that's exactly what I have."*

Two weeks later Gennia had a meeting with a major corporation. In her e-mail to me Gennia shared:

*"...this [system] has changed the game for me. Writing proposals (not taking days) was my biggest area of intimidation, which kept me from pursuing new business – it's been four years that I've been trying to get the right proposal for my business. Four years!!! I wanted a proposal that showed the true value of what clients are receiving without revealing my trade secrets. That's the first thing you showed me how to do. To have tackled and conquered it, feels incredible.*

*The guy was so impressed yesterday, I almost couldn't believe it. After we finished talking, he thumbed through the proposal and shook his head. I don't think he was expecting me to present him with anything. And having it so organized, I was able to go through line by line and expound.*

*Even if they don't hire me, to feel confident going into the meeting with a corporation like that? I had no butterflies and was not a bit nervous. I asked for the rate twice as high as I used to charge and they accepted. Can you tell I'm excited?"*

Gennia's system is just one form of a client intake system, but I'm sure it gives you some insight into how you can design a process that meets your own needs.

***Want me to look at what you've come up with to solve your client management woes or guide you through the whole process of overcoming them?***

[Work With Me](#)

## Project Management that Makes You Smile & Gets Things Done

Project management includes everything from a basic assignment you're working on for a client to a big event or online program you're creating to advance your business.

Sometimes you work on these projects by yourself. Other times, you get help from professionals with proven expertise in specific areas. Either way, it's vital to make sure that your [collaboration is stress-free](#) and you meet your deadlines as well as budget.

You also need to ensure that you can balance your day-to-day business activities and the immense amount of work that such projects usually require. Otherwise burnout is inevitable. If you've ever launched a program or a big project, you know exactly what I am talking about!

### ***You know your project management systems need attention when:***

- ✓ You plan new projects, but they keep reappearing on your to-do list month after month.
- ✓ You often have to apologize for missed project deadlines.
- ✓ Every new project feels like a mountain of work, so you keep procrastinating.
- ✓ Projects often become much more expensive than you originally estimated.
- ✓ You hire someone to help you, but they deliver low-quality work, miss deadlines or disappear altogether.

### case study

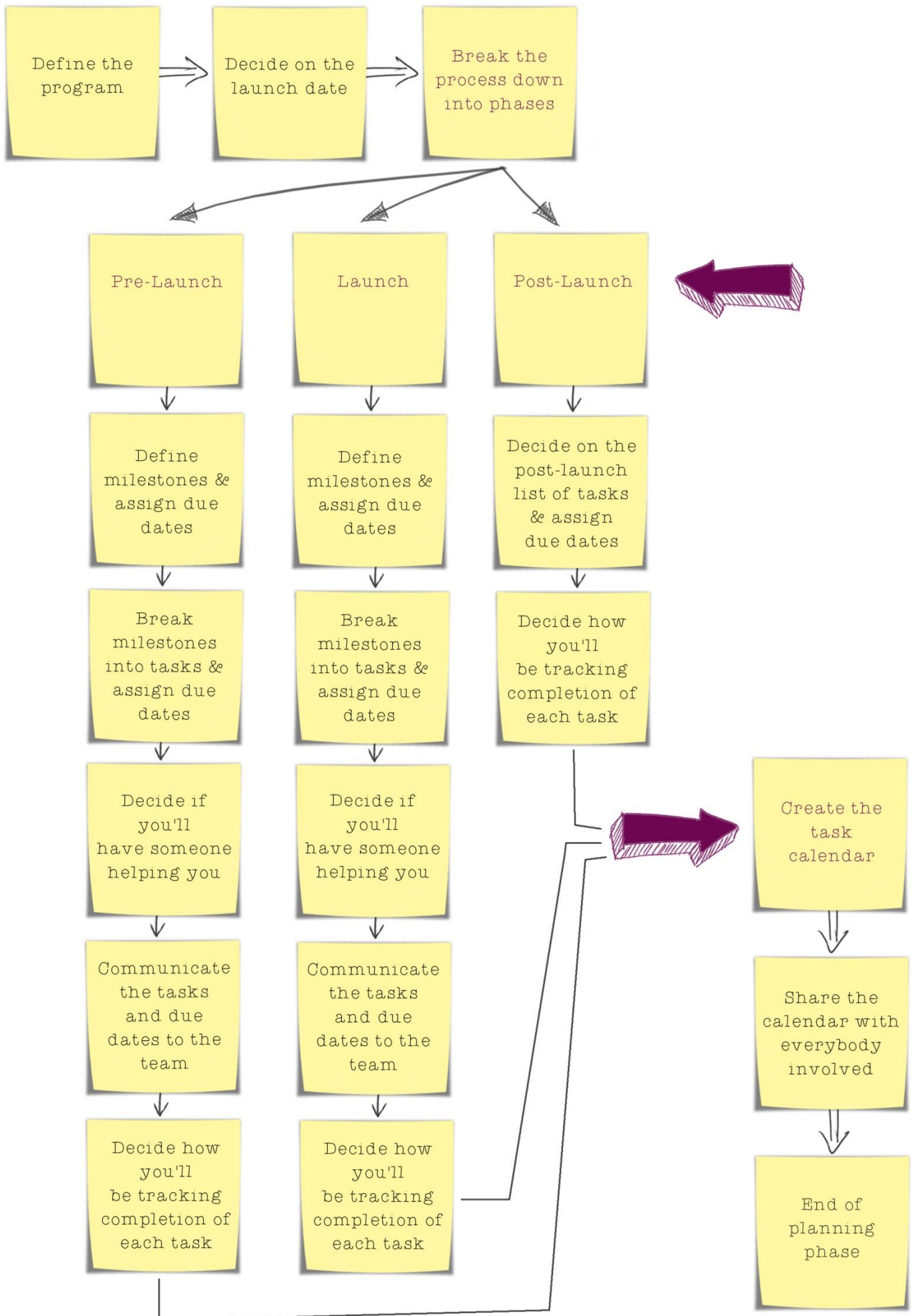
#### ***Nicole's New Program Launch System:***

*Nicole is a health coach. She's planning on launching 3 online programs this year. Nicole has been having a problem of sticking to set dates. This big goal makes Nicole feel overwhelmed and paralyzed, so she procrastinates and doesn't make much progress.*

Here is the Program Launch System we created for Nicole.



# program launch system



# program launch system



IMPORTANT  
REMINDERS!

## 1. When Defining the Program:

- Determine the goal
- Set the intention
- Outline the benefits
- Think of the program name
- Choose the length and format



## 2. When Working on the Different Phases, Consider:

- What content needs to be created
- What tools you're going to use
- Ways to spread the word
- Contingency plan

Creating and launching programs or projects can quickly become overwhelming, especially if you try to squeeze them into your already busy schedule. If you need something very simple, test out Nicole's approach.

In Nicole's  
words

[Click here to watch Nicole's video testimonial](#)



*Need me to check out your new system to make sure you've got all bases covered or create more sophisticated project management systems for you?*

[Work With Me](#)

## Cheat Sheet to Earn Your “A” for Amazing Administration

Breaking the cycle of busying yourself with a hundred different things at once so that you can really grow your business doesn't mean that you no longer have to stay on top of everything that needs to happen in your company. You've got to make time to [organize your internal operations](#). Clearly defined processes for regularly occurring activities enable you to breeze through them and actually save you lots of time!

### ***You know your administration systems need attention when:***

- ✓ You're always busy but don't seem to make much progress.
- ✓ Your inbox sucks you in and you often treat it as your to-do list.
- ✓ You feel paralyzed, because there is a lot to do, but you don't know where to start.
- ✓ You're trying to accomplish several things at once and in the end none of them is done well.
- ✓ Things keep falling through the cracks.

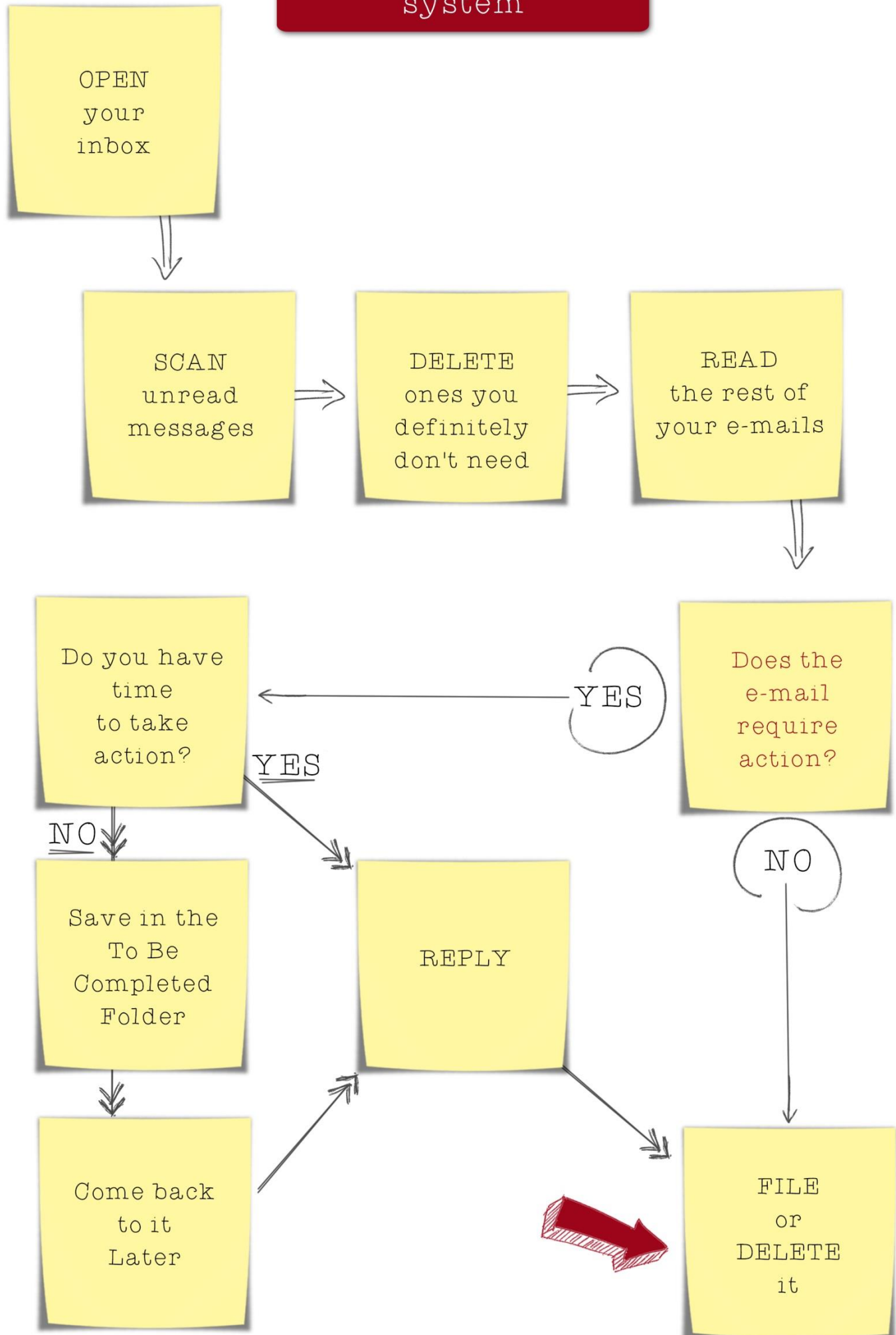
### case study

#### ***Nicole's New Easy E-mail Management System:***

*Nicole has two different e-mail accounts—a personal and work one. Between those two accounts she receives an overwhelming number of e-mails every day. Sometimes she spends all day in her inbox, tackling each one and feeling like these e-mails are her to-do list. Nicole feels she is drowning in these messages and isn't getting to the high-leverage tasks that are going to make her business thrive.*

Read on to have a look at the E-Mail Management System we created for Nicole.

# email management system



## email management system



1. Choose a specific time to check your e-mail.
2. Schedule a block of time to process your inbox.
3. Create folders to organize your Inbox (e. g., Follow Up, To Be Completed, Individual Clients, etc.).
4. Check your "To Be Completed" folder regularly, so you don't forget to take action.
5. If the item requires follow up (e.g., a reply from another party), put it into the "Follow Up" folder and mark your calendar to follow up.

## Free Yourself to Thrive with Easy Financial Systems

Growing a profitable business requires knowing where your money is coming from and where it goes. You need to know when (and whether) your clients are paying you and how to present that information to the government so that you comply with all regulations. Having solid billing, bookkeeping and accounting systems in place is vital.

Our financial systems are the ones that usually cause [most of the headaches](#) just because we don't always have the knowledge of what needs to be done and don't have resources to hire a professional to help us. But who has the time and stamina to consistently update their expenses and profits spread sheets? And honestly, it can cost you more if you don't handle them properly.

### ***You know your financial systems need attention when:***

- ✓ You don't know your profit/loss figures for each month.
- ✓ Data entry for your bookkeeping system doesn't get done.
- ✓ You have to manually send invoices for reoccurring payments.
- ✓ You don't have a system in place to track expenses.
- ✓ You don't have a system in place for client invoicing or payment collection.

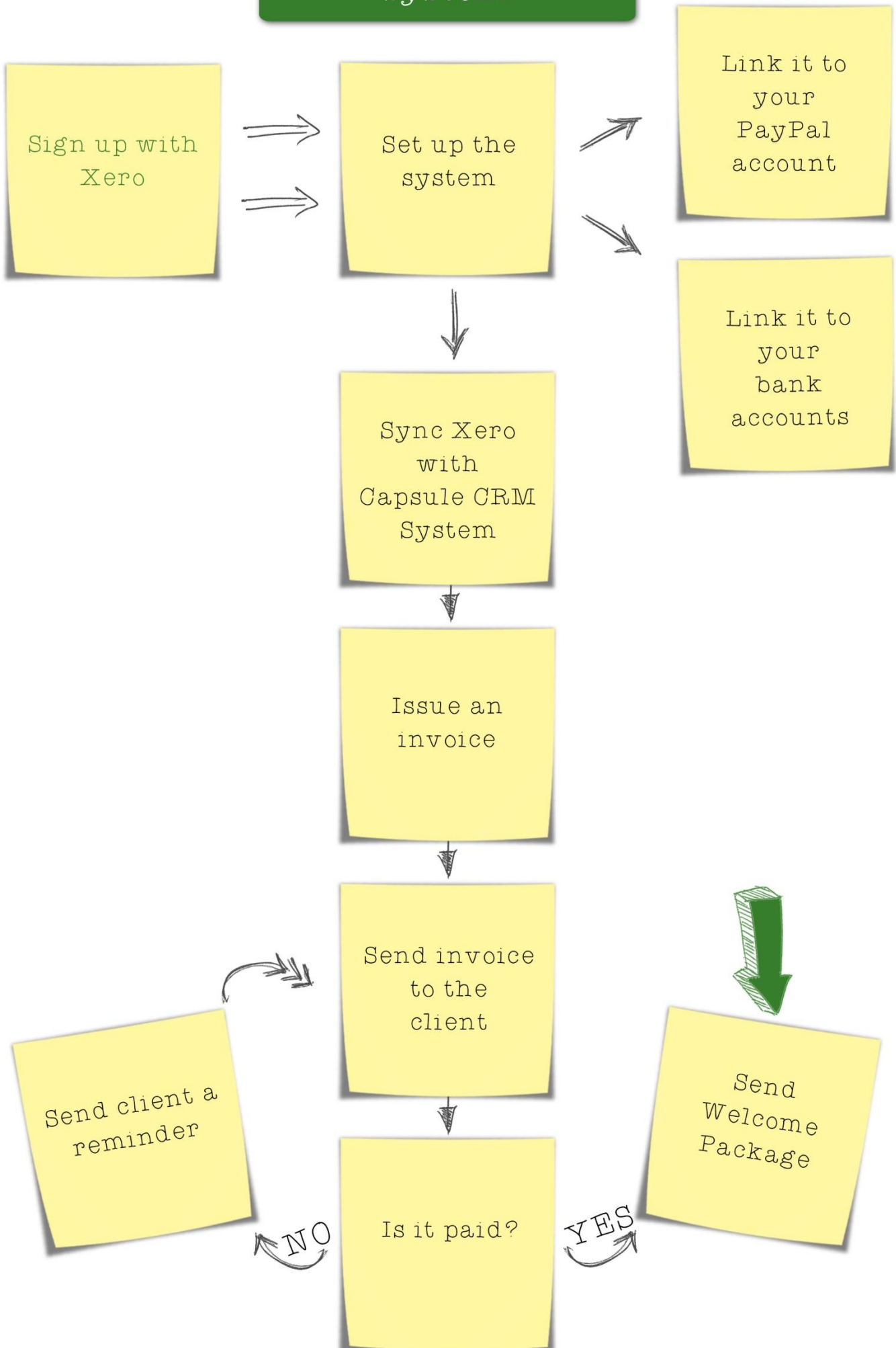
### case study

#### ***Laura's New Powerful Financial System:***

*Laura is a copywriter. She doesn't have a system to track expenses or a system to invoice her clients, so she doesn't really know where she stands in her business. Laura just deposits everything into her business checking account, pays business expenses from there and pretty much hopes for the best.*

Take a look at the Financial System we created for Laura.

# financial system





## financial system



HANDY  
REMINDERS

1. Linking Xero with your other accounts allows you to access your latest financial data at all times.
2. You'll be able to see which invoices have been paid and which haven't.
3. Syncing Xero with your CRM saves you time and prevents you from having to enter your client's info more than once.
4. You'll be able to effortlessly collaborate with an accounting professional when you need them.

- 1st and 15th of each month check your bank transactions to make sure they are properly labeled.
- End of each month check your budget against of your actual income; set a goal for next month.
- Regularly check which invoices haven't been paid (especially, for the clients on payment plans).



Financial systems don't have to be complicated and time consuming. A lot of times simply finding the right tools solves the problem, like in Laura's case.

In Laura's  
words

*I never thought it would be this easy! I am finally living up to my revenue potential, because I'm tracking my profits and expenses and take action when I see I'm missing the mark. It's so great to be in control again!*

***If you are not sure what's the best system for your business  
or if you've been neglecting your finances for too long and now can't even  
face it alone, I am here for you.***

[Work With Me](#)

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## CONGRATULATIONS!

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### NEXT STEPS

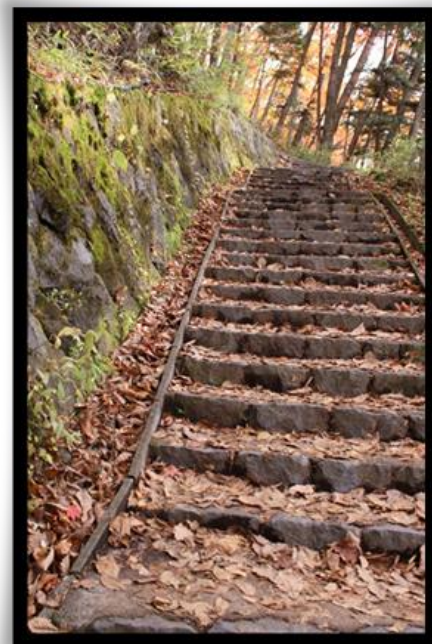
Yay!

You should be proud of yourself for having gone through this entire guide.

Now, as you take the next steps forward—whether that’s by hiring me to lift the systems-related burden from your shoulders or by yourself—I want you to remember something. . .

It’s okay to start with baby steps. Even small steps towards optimizing your systems can make a huge difference.

I’m just an e-mail away  
**[systems@systemsrock.com]** if you’re ready to team up with a systems expert who’ll create systems that work FOR YOU and support you as you implement and integrate them.



[Click here to hear what Jo has to say about the systems we created for her biz!](#)



Here’s to thriving businesses and happy business owners!

All the best,

Natasha (your Systems Chick)