



FREE WEBINAR

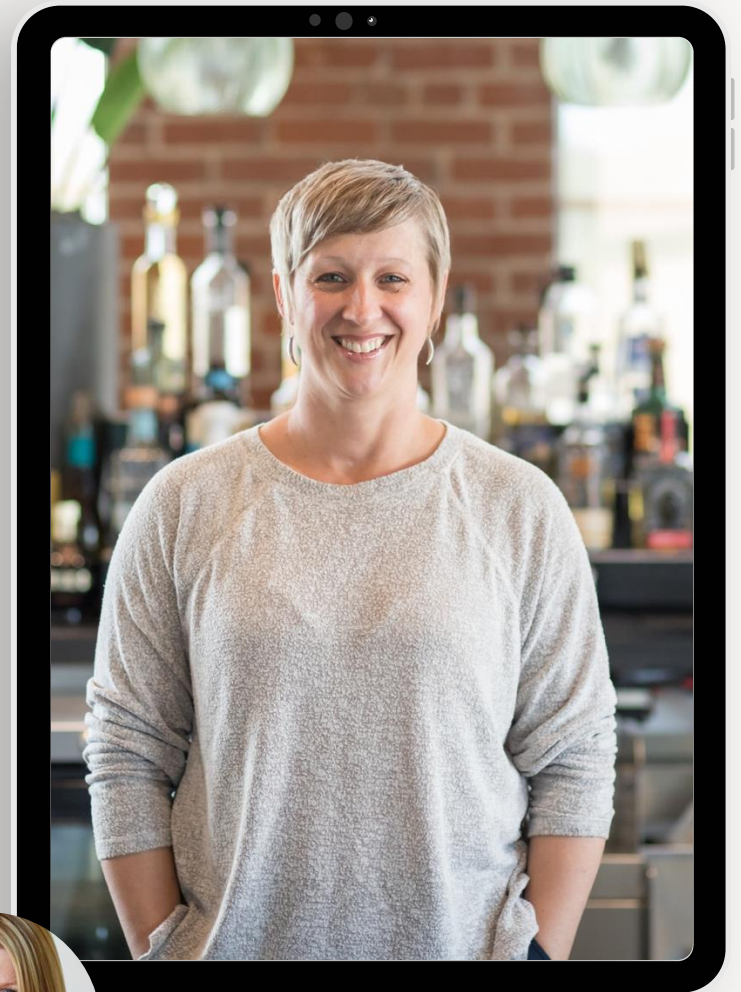
Time-Saving Tools and Systems for Your Consulting Business



Wednesday
September 25, 2024



2:00pm - 3:30pm ET
11am PT | 12pm MT | 1pm CT



Presented by:
Mandy Pearce



Joined by:
Anne Schmidt
Owner, NJ Web Creative



www.fundingforgood.org



Funding For Good

Owner, Mandy Pearce

Strategic Planning - Development & Business
Coaching - Board Development & Education
Fundraising Planning & Strategy - Consensus-Building
Community Planning - Budgeting



MANDY@FUNDINGFORGOOD.ORG • FUNDINGFORGOOD.ORG



NJ Web Creative

Owner, Anne Schmidt

Web Design • Logo Design • Visual Identity
for entrepreneurs, nonprofits + small businesses

Coming Soon
templated
DESIGN CO. ✦

ANNE@NJWEBCREATIVE.COM • NJWEBCREATIVE.COM • TEMPLATEDDESIGN.CO



What we'll cover:

1. Tools FFG has and does use and why.
2. Questions to consider when working with an email/CRM platform.
3. Web hosting needs and options.
4. Plugins that make your life easier.
5. Ways to reduce your admin time through systems and tools.

POLL

Where are you in your business development?

- Just thinking about starting a biz
- Part-time side hustle
- Consulting full-time

Systems and Tools

FFG Uses

1

FG Business Tools



WordPress (Website)

WordPress is the simplest, most popular way to create your own website, eCommerce store or blog. In fact, WordPress powers over 43.2% of all the websites on the Internet – which is about 2 out of every 5 sites you visit. And it's still growing rapidly.



ActiveCampaign (CRM)

ActiveCampaign is a cloud-based email marketing, automation and CRM software for an advanced customer experience.



Stripe (Invoicing)

Stripe is a payment processing platform. Millions of companies use to accept payments, send payouts, and manage their businesses online.



Acuity Scheduling (Bookings)

Acuity Scheduling is an all-in-one appointment tool that helps you schedule anything and helps you automate everything from payments to reminders.



Vimeo (Video Storage)

Vimeo is an all-in-one video platform that helps you make, manage, and share videos and virtual events with your selected audience. The platform is ad-free and includes services such as video creation, editing and broadcasting tools.



Zoom Meetings (Webinars)

Connect, collaborate, and get more done together with trusted video meetings. We also used Zoom for the NPCC Conference.



Zapier (Automation)

Zapier is a no-code automation tool that lets you connect your apps into automated workflows. As of 2021, it connects to more than 4,000 apps, with free and paid plans.

FG Productivity Tools



Asana (Project Management)

Asana service is a web and mobile "work management" platform designed to help teams organize, track, and manage their work.



Google (Collaboration)

Google Meet, Drive, Docs, Sheets, Forms, and more. Flexible, helpful business collaboration solutions for all the ways work is changing.



DropBox/DropBox Sign (File Hosting)

DropBox is a file hosting service (cloud storage service) with products for sharing, collaboration, eSignature, document tracking, and backup.



Gusto (Payroll)

Gusto Payroll is an innovative payroll software designed to automate and streamline the payroll process for small to medium-sized businesses.



Adobe Acrobat (Docs)

Create, edit, and review PDFs. E-sign documents and collect signatures. Collaborate with your team. All in one app.



Canva (Design)

Create, edit, and review PDFs. E-sign documents and collect signatures. Collaborate with your team. All in one app. Start free trial.

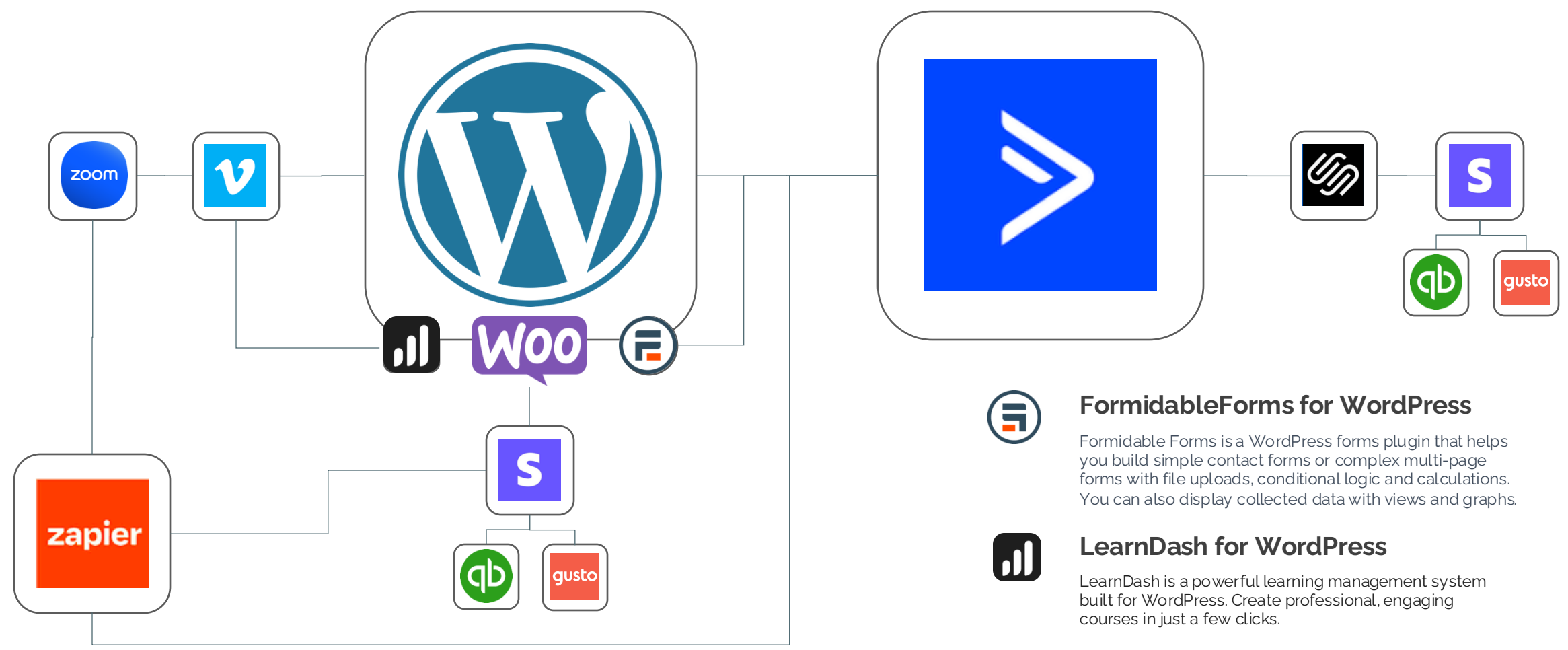
Example of how FG's systems and tools integrate

Let's look at the creation of a product from inception to sale





FG Putting Them Together



FormidableForms for WordPress

Formidable Forms is a WordPress forms plugin that helps you build simple contact forms or complex multi-page forms with file uploads, conditional logic and calculations. You can also display collected data with views and graphs.



LearnDash for WordPress

LearnDash is a powerful learning management system built for WordPress. Create professional, engaging courses in just a few clicks.

Things to Consider About Paid Tools

- **WordPress** - Free, but you need a web hosting service to provide a "home/space" on the web to display it
- **SiteGround** - FG's web hosting service (pricing starts at \$17.99/month)
- **WooCommerce** - Free. Additional plugins may be purchased as needed and cost anywhere from \$19 to a couple hundred a year
- **Formidable** starts at \$79/year
- **LearnDash** - \$199/year
- **Zapier** – Basic plan for free. Then starts at \$240/year
- **Vimeo** – Starts at \$144/year
- **Zoom** - Basic plan for free. Then starts at \$159/year
- **Acuity** – Starts at \$18/month
- **Asana** - Basic plan for free. Then starts at \$132/year
- **DropBox** – FG uses \$119.88 version
- **Google** – FG starts at \$6 per month per user
- **Gusto** – FG has a \$40/month plan + \$6 per person for payments

For a paid product, we are investing approx. \$579/month plus web developer's time to create a product, market, update site, and Mandy's time to market, etc.

**The more you sell, the more transactions you have to process. That takes more time for you, or your accountant = \$. Also, the more you sell, the more taxes/fees you pay for processing.



Questions About Email/CRMs

2

Questions About Email/CRM Systems

EMAIL SYSTEM QUESTIONS (FG uses Active Campaign)

Email marketing software helps you build a subscriber list and reach out to those customers via email campaigns.

- How many contacts are allowed at each subscription level?
- Do inactive contacts count towards subscription levels?
- What are your design features like?
- Is there a limit to the number of emails I can send monthly?
- Is there a limit to the number of contacts I can email monthly?
- What other platforms do you integrate with?
- What types of reports/metrics are included out of the box?
- Is double opt-in required?
- Can I import lists to my database? Are there restrictions on how many per list?
- What is your support like (online, chat, phone, training resources, etc.)

CRM SYSTEMS (FG uses ActiveCampaign and WordPress via a Plugin)

Customer Relationship Management software is about managing the relationships between you and your customers. With a CRM, you can store and organize customer info., track incoming and current leads, set up automated emails, and even measure the results of your sales and marketing strategies.

- What is your automation/funnel system like?
- What types of reports/metrics are included in the CRM out of the box?
- Can I create custom reports to view sales by product, lead source, territory, etc.?
- What apps or other systems do you integrate with?
- Does the CRM allow you to filter and view leads by value, assignee, age of the lead, stage, confidence, and other attributes?
- Does the CRM offer an interactive map to view and filter leads geographically?
- Does the CRM automatically advance leads btwn stages when stage goals are met?
- Does the CRM automatically subscribe/unsubscribe leads to marketing email lists depending on where they are in a funnel?
- What type of support do you offer?

Web Hosting Needs and Options

3

POLL

Do you currently have a website?

- No, but we need one
- No, and we don't need one
- Yes, but it needs work
- Yes, and we work on it regularly

7 Factors to Consider When Selecting a Web Hosting Service

**see handout for additional details*

01 Uptime

02 Speed

03 Scalability

04 Data Security + Backups

05 Available Storage

06 Customer Support

07 Pricing

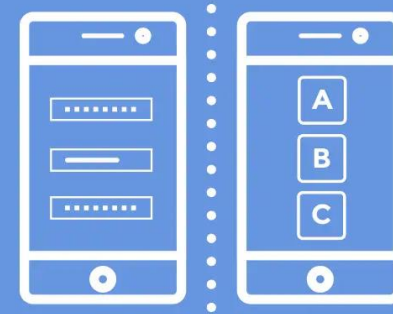
Plugins That Simplify Your Life

4

Widget vs Plugin

Directly from Google

While they are similar to one another, the main differences between the two are visibility and interaction. If it keeps your page running and functioning properly in the background, it's a plugin. If a user can see it and interact with it on the page, it's a widget.



A person wearing a bright yellow sweater is sitting on a wooden floor, using a silver laptop. The laptop screen is lit up, and their hands are on the keyboard. The background is slightly blurred, showing a warm, orange-toned environment.

Widget Examples

Widget areas are global parts in your site's layout that can accept blocks. These vary by theme but are typically parts like your Sidebar or Footer.

Default content that can be added to a Widget:

- Contact Forms
- Blog/Page Categories
- Blog/Page Tag cloud
- Blog Post List
- Search Bar
- Buttons
- Images
- Text





Plugin Examples

- **WooCommerce** – eCommerce solution.
- **WooCommerce Stripe Gateway** – Integrates WooCommerce with Stripe.
- **AutomateWoo** – Integrates WooCommerce with ActiveCampaign.
- **ActiveCampaign** – Integrates ActiveCampaign with WordPress.
- **LearnDash** – Course management.
- **Anti-Spam by CleanTalk**
- **FormidableForms** – Registrations, contact forms, surveys, questionnaires.
- **Event List** - Easy way to list out upcoming events.
- **User Switching** – Excellent when helping clients diagnose site or account issues.
- **Divi** – several individual Divi plugins for customizations and
- **Speed Optimizer**– Caching performance plugin to speed up your WordPress site.



Ways to Reduce Admin Time

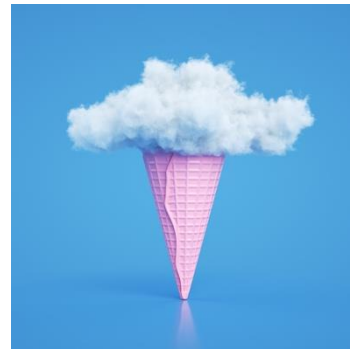
5

Simplify Your Life



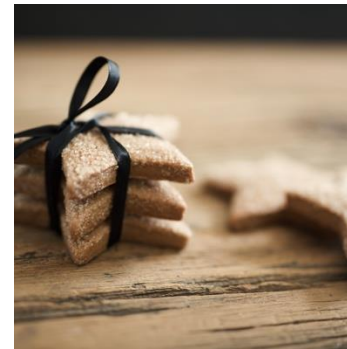
Zapier

- Get registration links into your webinar platform
- Add registration info to your CRM
- Automate processes



Funnels

- Email autoresponders
- Sales receipts
- Webinar reminders
- Items in cart reminders
- Expiration reminders



Templates

- Create email templates for segments
- Create process templates
- Create product templates
- Website page templates



Asana Templates

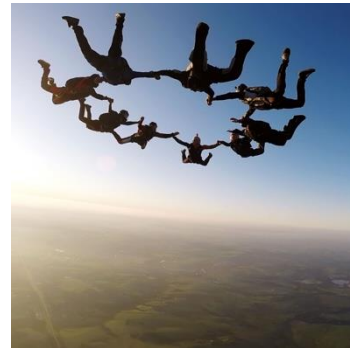
- Automate processes
- Automate reminders
- Automate to-dos
- Workflow Setups

Simplify Your Life



Shared Files

- Systems like Google Docs, **Asana**, **DropBox**, Monday, Trello, WeTransfer, HelloSign
- Create and restrict access across your team/clients



Standard Formats

- Branding guidelines (fonts, color palates, concepts, logos, etc.)
- Email signatures across the company
- Standard replies to inquiries



Project Pricing

- Easier to create quotes
- Easier to have conversations across the team and with prospects
- Easier to market



Email List Clean Ups

- Clean up bounces
- Clean up from auto-responders/vacay replies
- Clean up from inactivity

RESOURCES

1

30 Questions to Ask Your Next Email Service Provider

<https://www.validity.com/blog/30-questions-to-ask-your-next-email-service-provider-esp/>

2

Widget vs Plugin

<https://qodeinteractive.com/magazine/wordpress-widgets-vs-plugins/>

3

CRM vs. Email Marketing

<https://www.nutshell.com/blog/crms-and-email-marketing>

4

CRM vs. Email Marketing vs. Marketing Automation

<https://www.activecampaign.com/blog/crm-vs-email-marketing>

5

CRM Comparison Worksheet

<https://www.nutshell.com/resources/crm-comparison-worksheet>

6

Consultation On-Demand with Mandy

<https://fundingforgood.org/impact-work/consultations-on-demand/>

7

60-Day Consulting Boot Camp with Funding For Good

<https://fundingforgood.org/nonprofit-consulting/bootcamp/>

8

Consulting Webinars

<https://fundingforgood.org/webinars/consulting/>

POLL

Who is already registered for the NPCC In-Person?

- I am
- I am not (didn't know about it)
- I am not, but plan to
- Nope

Optimizing for Success: Where Passion and Profit Meet



Marie Palacio

*Lead Consultant
Funding for Good*



Sabrina Walker Hernandez

*President & CEO
Supporting World Hope*



Mandy Pearce

*Owner
Funding for Good*



Phillip Deng

*Cofounder & CEO
Grantable*



Jarrett Ransom

*President & CEO
The Rayvan Group*



Rachel Muir

*Speaker & Trainer
League of Extraordinary Fundraisers*



October 3 - 4, 2024



Space Coast, Florida



JOIN US LIVE



fundingforgood.org/npcc-2024





Q + A



Funding For Good

Owner, Mandy Pearce

Strategic Planning - Development & Business
Coaching - Board Development & Education
Fundraising Planning & Strategy - Consensus-Building
Community Planning - Budgeting



MANDY@FUNDINGFORGOOD.ORG • FUNDINGFORGOOD.ORG