HOW TO START AND GROW YOUR BUSINESS ONLINE

RAHEEM A CANNON

2020 Edition

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Module 1
Starting a Business

Introduction to the Module

This module will deepen your understanding of the initial steps of starting a business in the US essentials. So, let's get started!

Topics to be covered in this module:
- EIN Number
- Links to get your EIN number in the US
- State registration
- Links to each States business registration page
- Trademarks
- Links to trademark your logos
- QUIZ

EIN Number

An Employer Identification Number (EIN) is a unique identification number that is assigned to a business entity so that it can easily be identified by the Internal Revenue Service (IRS).

Some key points about EIN are below

- The EIN is also known as a Federal Tax Identification Number (TIN)
- EINs are completely free ($0)from the IRS, and applications are available on the IRS website and can easily be filled and submitted electronically
- All forms of businesses can apply for and be issued EINs
- The digits of an EIN are formatted as follows: XX-XXXXXXX
- You don't have to be an American to get an EIN
- You don't need a SSN (Social Security Number) to get an EIN
- ITIN (Individual Taxpayer Identification Number) is not mandatory to get an EIN
- You can't get an EIN online unless you have a SSN or ITIN

Links to Get Your EIN in the US

Applying for an Employer Identification Number (EIN) is a free service offered by the Internal Revenue Service. Beware of websites on the Internet that charge for this free service.

All EIN applications (mail, fax, electronic) must disclose the name and Taxpayer Identification Number (SSN, ITIN, or EIN) of the true principal officer, general partner, grantor, owner or trustor. This individual or entity, which the IRS will call the "responsible party," controls, manages or directs the applicant entity and the disposition of its funds and assets. Unless the applicant is a government entity, the responsible party must be an individual (i.e., a natural person), not an entity.

Apply Online

The Internet EIN application is the preferred method for customers to apply for and obtain an EIN. Once the application is completed, the information is validated during the online session, and an EIN is issued immediately. The online application process is available for all entities whose principal business, office or agency, or legal residence (in the case of an individual), is located in the United States or US Territories.

Apply by Fax

Taxpayers can fax the completed Form SS-4 application to the appropriate fax number (see Where to File Your Taxes (for Form SS-4)), after ensuring that the Form SS-4 contains all of the required information. If it is determined that the entity needs a new EIN, one will be assigned using the appropriate procedures for the entity type. If the taxpayer's fax number is provided, a fax will be sent back with the EIN within four (4) business days.

Apply by Mail

The processing timeframe for an EIN application received by mail is four weeks. Ensure that the Form SS-4 contains all of the required information. If it is determined that the entity needs a new EIN, one will be assigned using the appropriate procedures for the entity type and mailed to the taxpayer. Find out where to mail Form SS-4 on the Where to File Your Taxes (for Form SS-4) page.

Apply by Telephone – International Applicants

International applicants may call 267-941-1099 (not a toll-free number) 6 a.m. to 11 p.m. (Eastern Time) Monday through Friday to obtain their EIN. The person making the call must be authorized to receive the EIN and answer questions concerning the Form SS-4 Application for Employer Identification Number. Complete the Third-Party Designee section only if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of Form SS-4. The designee's authority terminates at the time the EIN is assigned and released to the designee. You must complete the signature area for the authorization to be valid.

State Registration

If your business is an LLC, corporation, partnership, or non-profit corporation, you'll probably need to register with any state where you conduct business activities.

Typically, you're considered to be conducting business activities in a state when:

- Your business has a physical presence in the state
- You often have in-person meetings with clients in the state
- A significant portion of your company's revenue comes from the state
- Any of your employees work in the state

Some states allow you to register online, and some states make you file paper documents in person or through the mail.

Most states require you to register with the Secretary of State's office, a Business Bureau, or a Business Agency.

Get a Registered Agent

If your business is an LLC, corporation, partnership, or non-profit corporation, you'll need a registered agent in your state before you file.

A registered agent receives official papers and legal documents on behalf of your company. The registered agent must be located in the state where you register.

File State Documents and Fees

In most cases, the total cost to register your business will be less than $300, but fees vary depending on your state and business structure.

The information you'll need typically includes:

- Business name
- Business location
- Ownership, management structure, or directors
- Registered agent information
- Number and value of shares (if you're a corporation)

The documents you need — and what goes in them — will vary based on your state and business structure.

In addition, some states also require you to register your DBA — a trade name or a fictitious name — if you use one. Check with your state government office to determine what's required in your area.

Links to Each States Business Registration Page

Secretary of State offices are responsible for registering corporations, limited liability companies (LLCs), and partnerships; handling business mergers and acquisitions; and processing the articles of dissolution in the event you close down a business.

For your convenience, here are quick links and phone numbers for the Secretary of State offices for all U.S. states and territories:

1. Alabama Secretary of State, 334-242-7200
2. Alaska Secretary of State, 907-465-2530
3. Arizona Secretary of State, 602-542-3230
4. Arkansas Secretary of State, 501-682-1010
5. California Secretary of State, 916-653-3795
6. Colorado Secretary of State, 303-894-2251
7. Connecticut Secretary of State, 203-566-3216
8. Delaware Secretary of State, 302-739-4111
9. District of Columbia Secretary of State, 202-727-7278
10. Florida Secretary of State, 904-488-9000
11. Georgia Secretary of State, 404-656-2817
12. Guam Government Site,671-472-7679
13. Hawaii Secretary of State, 808-586-2727
14. Idaho Secretary of State, 208-334-2300
15. Illinois Secretary of State, 217-782-7880
16. Indiana Secretary of State, 317-232-6576
17. Iowa Secretary of State, 515-281-5204
18. Kansas Secretary of State, 913-296-2236
19. Kentucky Secretary of State, 502-564-2848
20. Louisiana Secretary of State, 504-925-4704
21. Maine Secretary of State, 207-287-3676
22. Maryland Secretary of State, 410-225-1330
23. Massachusetts Secretary of State, 617-727-9640
24. Michigan Secretary of State, 517-334-6206
25. Minnesota Secretary of State, 612-296-2803

26. Mississippi Secretary of State, 601-359-1333
27. Missouri Secretary of State, 314-751-1310
28. Montana Secretary of State, 406-444-3665
29. Nebraska Secretary of State, 402-471-4079
30. Nevada Secretary of State, 702-687-5203
31. New Hampshire Secretary of State, 603-271-3242
32. New Jersey Secretary of State, 609-530-6400
33. New Mexico Secretary of State, 505-827-4508
34. New York Secretary of State, 518-474-4752
35. North Carolina Secretary of State, 919-733-4201
36. North Dakota Secretary of State, 701-328-4284
37. Ohio Secretary of State, 614-466-3910
38. Oklahoma Secretary of State, 405-521-3911
39. Oregon Secretary of State, 503-986-2200
40. Pennsylvania Secretary of State, 717-787-1057
41. Puerto Rico Secretary of State, 787-722-2121
42. Rhode Island Secretary of State, 401-277-2357
43. South Carolina Secretary of State, 803-734-2158
44. South Dakota Secretary of State, 605-773-4845
45. Tennessee Secretary of State, 615-741-2286
46. Texas Secretary of State, 512-463-5555
47. Utah Secretary of State, 801-530-4849
48. Vermont Secretary of State, 802-828-2386
49. Virgin Islands Secretary of State, 340-776-8515
50. Virginia Secretary of State, 804-371-9141
51. Washington Secretary of State, 360-725-0377
52. West Virginia Secretary of State, 304-558-8000
53. Wisconsin Secretary of State, 608-266-3590
54. Wyoming Secretary of State, 307-777-7311

Trademarks

The term trademark refers to a recognizable insignia, phrase, word, or symbol that denotes a specific product and legally differentiates it from all other products of its kind.

Some key points about trademarks are below:

- It legally differentiates a product or service from all others of its kind and recognizes the source company's ownership of the brand
- Trademarks may or may not be registered and are denoted by the ® and ™ symbols respectively
- Although trademarks do not expire, the owner must make regular use of it in order to receive the protections associated with them
- Trademarks are generally considered a form of intellectual property and may or may not be registered
- Trademarks can be corporate logos, slogans, brands, or the brand name of a product
- Using a trademark prevents others from using a company or individual's products or services without their permission
- Trademarks in the United States are registered through the United States Patent and Trademark Office (USPTO)

Links to Trademark Your Logos

Before trademarking your name or logo, you need to conduct a trademark search to make sure no one else is already using a similar one. You can do so with the help of a tool called Trademark Electronic Search System (TESS), which you can find on the official website of the United States Patent and Trademark Office.

Conducting a trademark search through the TESS Database is of crucial importance, because it can identify potential conflicts with an existing trademark of another company or a trademark for which approval is pending.

It's also important because you'll save money you would spend applying for the registration which may not be approved because it's too similar to an existing trademark. Keep in mind that the United States Patent and Trademark Office does not search for conflicting trademarks until after you submit your application.

Once you have conducted your trademark search, you need to file a trademark application through the Trademark Electronic Application System (TEAS). You'll be presented with a form to fill out—after you decide which application is right for you.

You can choose one of three different application forms: TEAS Plus, TEAS Reduced or TEAS Regular.

If you choose the "intent-to-use basis" (ITU) in your application, you will also need to pay an additional filing fee of $50 for at least one class of products or services.

After the submission of your registration, you'll receive an email confirmation and all you have to do next is wait for the approval. In approximately three months after you submitted your application, it will be reviewed by an attorney who will determine whether or not your application meets all of the legal requirements necessary for the trademark approval.

It is important to monitor your application's progress every 3-4 months and you can do so through the Trademark Status & Document Retrieval (TSDR).

Dun and Bradstreet

Make sure to register for your Dun and Bradstreet number as this is what will be used to establish your business credit. This is free to do and can be done at the link below.

https://www.dnb.com/duns-number/get-a-duns.html

WWW.SBA.GOV

Is an incredible resource for additional information on businesses and the different breakdowns and structures.

MODULE 1 QUIZ

Q1: EIN stands for
a. Employer Identification Number
b. Employee Insurance Number
c. Employee Identification Number
d. Employer Insurance Number

Q2: Which of the following is not a feasible way to apply for EIN?
a. Apply Online
b. Apply by Telephone
c. Apply by Mail
d. Apply through Social Media

Q3: 'If your business is a sole proprietorship, you'll need a registered agent in your state before you file.' True or False

- True
- False

Q4: Trademarks can be corporate __________, slogans, _________, or the product name. Fill in the blanks.
a. Culture
b. Brand Name
c. Logos
d. Infrastructure

Q5: Which of the following link won't come useful to trademark your logo?
a. TIXN
b. TESS
c. TEAS
d. TSDR

Module 2
Research Your Competition and Understand Your Market

Introduction to the Module

This module will give you an understanding of the ins and outs of market research. Let's get started.

Topics to be covered in this module:

- Searching businesses with a similar business model
- Utilizing Google to find like-minded businesses
- Sourcing information on your consumer market
- Searching hashtags on social media with your products and services
- Googling your market
- Posting polls or questions in business groups on Facebook or just your statuses
- Finding the right manufactures for your products and ordering samples
- Setting a monthly budget for your business
- QUIZ

Searching Businesses with a Similar Business Model

A business model, in its simplest form is a summary of how your business makes money. It's a demonstration of how you deliver value to your customers at a reasonable price.

There are three basic parts of a business model.

- Everything required to make something: raw materials, logo, slogan, manufacturing, labor, domain etc.
- Everything it requires to sell: distribution, marketing, delivery and processing
- How and what the customer pays: payment methods, pricing strategy etc.

While researching your target market, focus on the businesses that offer business models similar to your intended model in the categories mentioned above. They are your competitors.

First of all, differentiate between direct and indirect competition.

- Direct Competition: Businesses that sell similar or exact products or services as you
- Indirect Competition: Businesses that share the same keywords but not the same type of products

Once you understand the difference between direct and indirect competition, now focus on the keyword. This is the very initial and effective step to search for how your competitors are doing online. Keywords refer to the single or couple of words that perform well in the search results by your competitors. Besides, they likewise light upon the brands who are not performing well but are considered important by your competition.

To identify what your competitors do to strengthen their businesses and what their weaknesses are, there are some paid tools. These keyword research tools will do the research for you. Here we've shortlisted some of them. Pay a visit to their website, see their package plans and offers then decide which one fits your business.

- Ubersuggest
- SEMRush
- Quick search
- Similarweb
- Builtwith
- STAT
- Wappalyzer
- Buzzsumo
- Spyfu
- Quicksprout
- Mozbar
- Owletter
- Mailcharts

Utilizing Google to Find Like-Minded Businesses

Google Search

You can likewise discover competitors free of charge utilizing the Google search engine. This is one of the most underrated processes that you can utilize to find the competitors' websites.

You can utilize this tool by inputting your site URL on the dedicated search box. The outcome of this search will be the top brand websites that are similar to yours. These websites are ruling your target market and territory. Using Google search engine is perhaps the least expensive way and the easiest resource to find that helps you access websites like yours.

By using this free tool first, you can list more keywords to search when you choose to limit your search to keywords using paid tools that require a subscription.

Google Keyword Planner

This is another free tool by Google that is used to search for keywords. You just need a Google account to access the tool. Keep it in mind that keyword planner uses the Google Ad Words interface.

Here you can easily find the related keywords by locating them using the "new keywords" tab. You can also input the certain keywords or phrases that you may need to search after you have entered in the competitors landing page URL.

Google, at that point, takes a few seconds navigating the website and searching for any words related to your keywords on the particular website. The outcome of the search is a chart that depicts the number of times that certain keywords have been used on the competitor's site.

Sourcing Information on Your Consumer Market

Sourcing information on your consumer market, aka market research, is a vital part of any business that wants to launch products or services on a specific consumer market.

As an entrepreneur, you have to know the A-Z of your customers, what they believe, what they want, what they need and how your business is facilitating their needs.

Try to answer the following questions through market research:

- Who are the target consumers of your products or services?
- How often will those consumers buy your products or services?
- What is the price range of the competitors' products on the market?
- How much are your consumers willing to pay for your products and services?
- What impressions are you able to make with your marketing campaigns?

Types of Market Research

There are two types of market research

- **Primary research:** the pursuit of first-hand data about your market and the consumers within your market
- **Secondary research:** the data and public records you have at your disposal to portray market image from

Primary Sources of Market Research

- Current customers
- Employees
- End consumers
- Suppliers
- Surveys

Secondary Sources of Market Research

- U.S. Census Bureau
- Bureau of Labor and Statistics
- Pew
- Gartner
- Forrester

Methods and Fields of Market Research

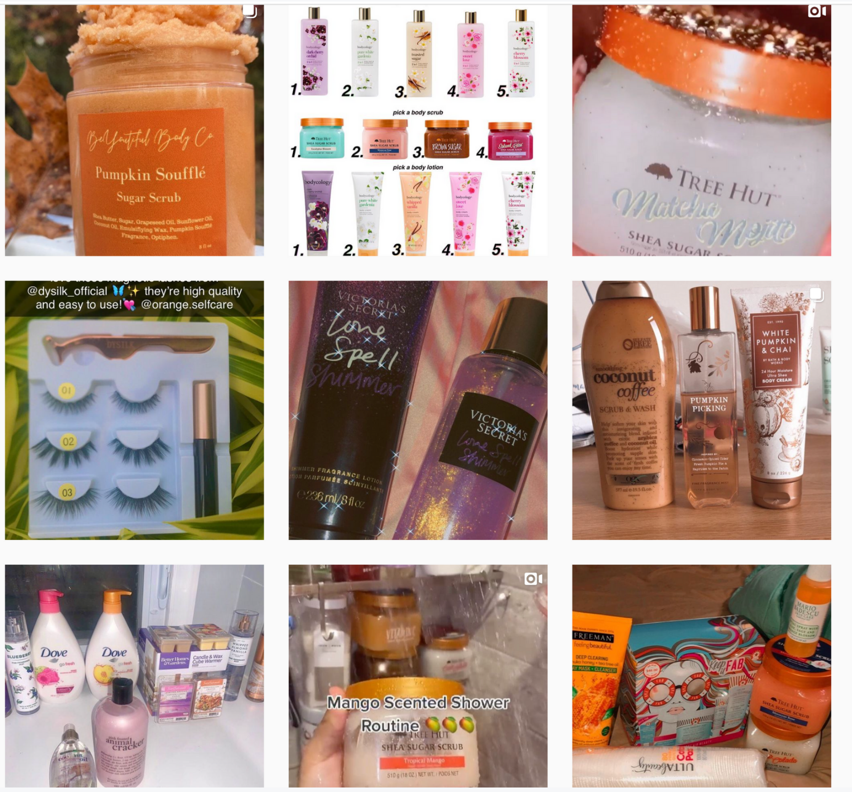
- Interviews
- Target groups
- Usage research
- Observation-based research
- Buyer persona research
- Pricing research
- Market segmentation research
- Competitive Analysis Research
- Brand awareness research
- Customer satisfaction and loyalty research
- Campaign research

Consumer Market Research Process

Here are the essential steps of the market research process

1. Identify the research purpose
2. Collect data from the market
3. Evaluate the collected data
4. Define your consumers' persona
5. Specify a persona group to engage
6. List your primary competitors
7. Analyze already collected and evaluated data
8. Interpret analyzed data
9. Summarize your findings

Bonus Page Which Feed Looks More Appealing?



Which would you be more likely to buy from and why?

Think about this with your own brand.

Links to Market Research Templates

- Five Forces Analysis Template
- SWOT Analysis Template
- Market Survey Template
- Focus Group Template

Searching Hashtags on Social Media with Your Products and Services

Hashtags refer to the usage of "#" to highlight a keyword or topic on social media. After originating on Twitter in 2007, hashtags became popular on Instagram, Facebook and other social media platforms.

Hashtag Search Sites for Social Media

- hashtags.org
- Hashtagify
- Sked Social
- #HashMe Hashtag Generator
- Display Purposes
- Hashtag Expert
- Instavast Hashtag Generator
- All Hashtag
- Ritetag
- Seekmetrics
- Instagram Hashtag Generator

Hashtag Best Practices

- Research and find out popular hashtags that apply to your products or services as part of a social media strategy.
- Make sure not to overuse or spam hashtags - two well-selected hashtags per post is more than enough.
- Use camel case for hashtags with multiple words or a phrase.
- Always use relevant hashtags that sync the post or any linked content with your product.

Googling Your Market

Its time to stack up against the competition. Find potential options to differentiate between your brand or product with Google's basic tools and features.

- Google Trends: Portrays real-time data to gauge consumer search interest in your brand or a competitor's brand
- Shopping Insights: Easily track competing products and brands in your niche. Evaluate how your products are performing in different territories
- Google Alerts: Use Google Alerts to monitor your brand and competition
- Google Predictive Search: A quick tool to see how people are searching yours or your competitors' brands and products
- Find My Audience: Go beyond demographics and locate people who are potential projects of your business
- Google Surveys: Find out what people think of your business, products and services
- Test My Site: Evaluate your mobile site speed, compare to industry peers and get tops to speed it up
- Grow My Store: Assess your retail channels, buyer experience and get tips on how to improve it

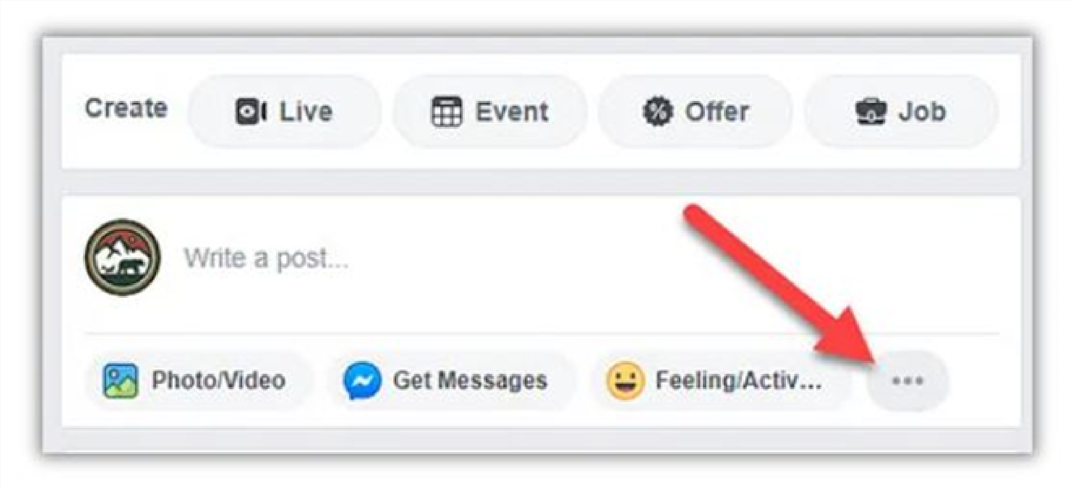
Posting Polls or Questions in Business Groups on Facebook or Just Your Statuses

Posting a poll in a Facebook group page can help you recognize the consensus among members of the group about a certain question.

When anyone answers a Facebook poll, the question appears on his or her own profile page, and you can also see it on your page to follow the most popular answers. A poll on your business page can also act as a useful tool in maintaining user interaction within a group.

How to Create a Poll on Facebook

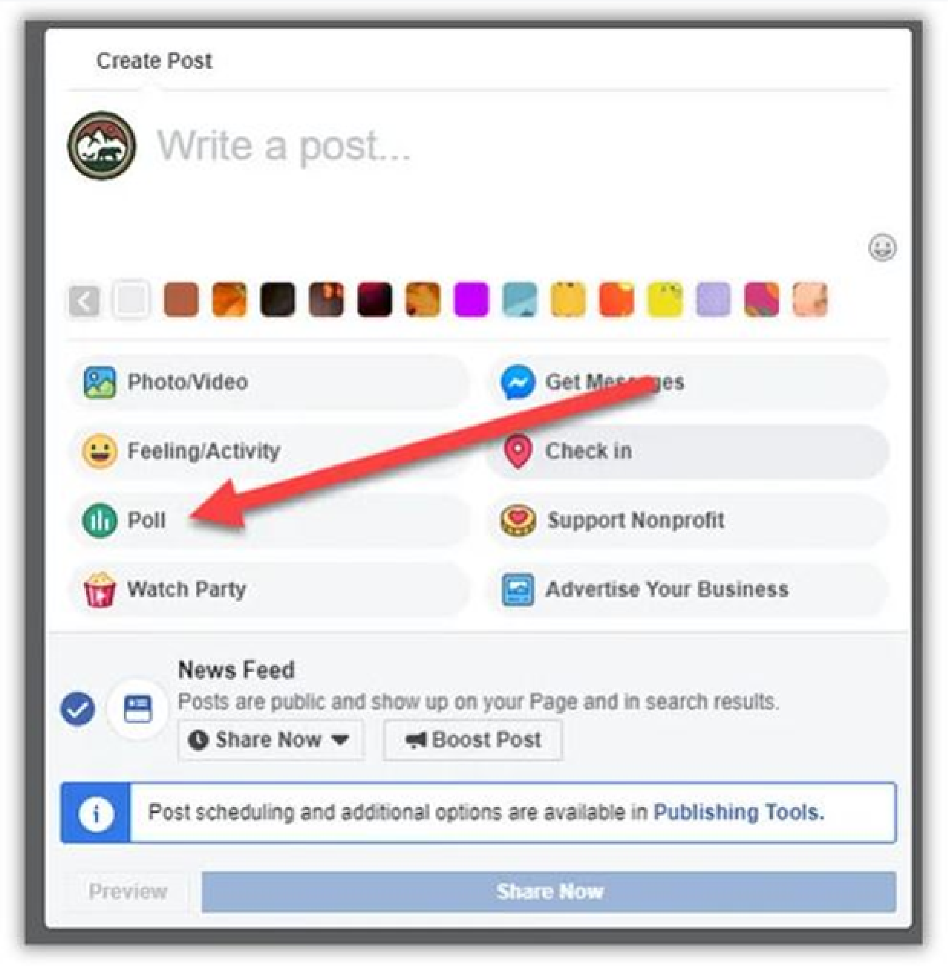
1. Login to your account
2. Go to your business page
3. Find the box where you'll see the option to make a post
4. Or, click on the "..." button



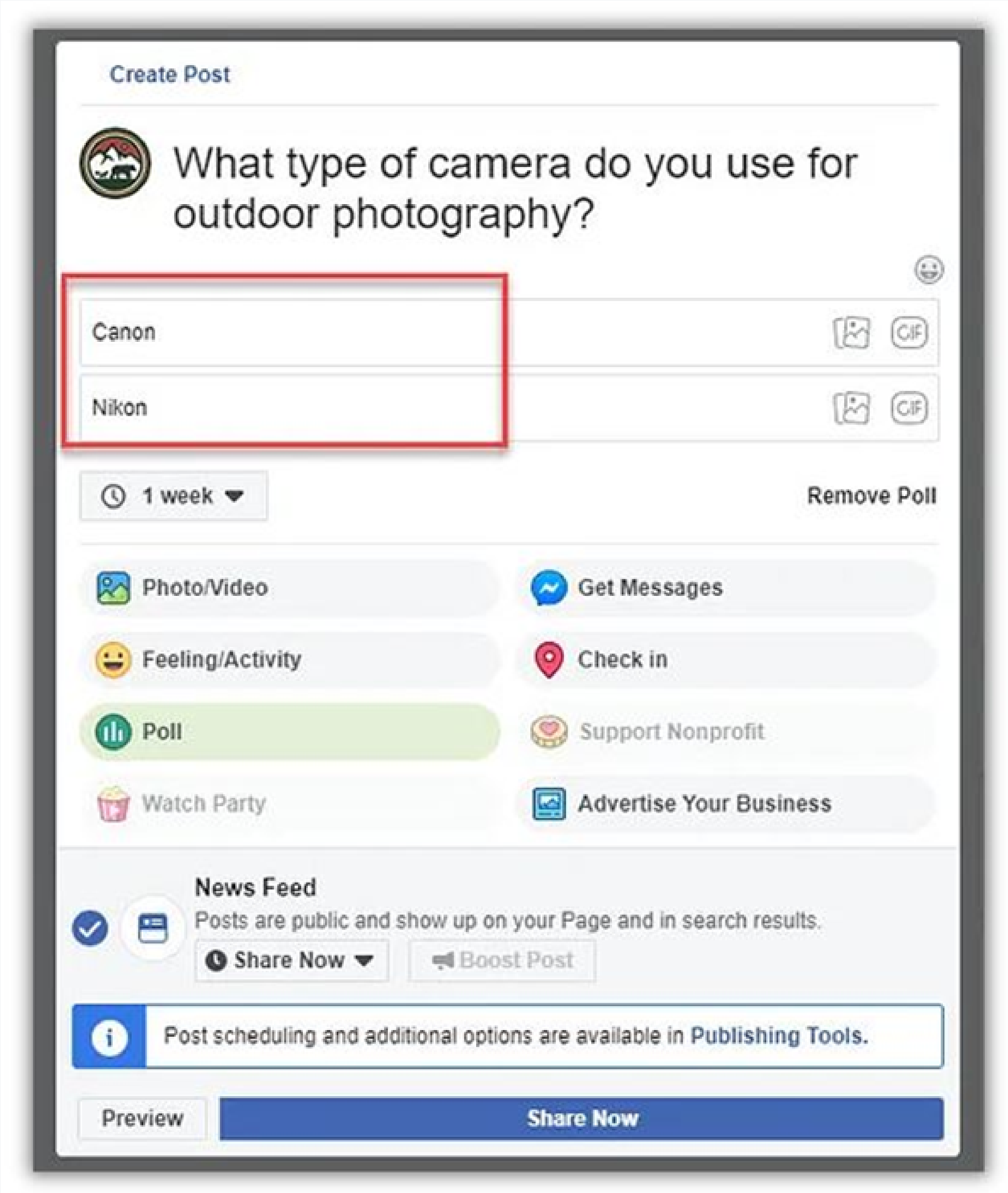
5. Locate and click 'poll'

The last update of Facebook introduced three new options while creating polls

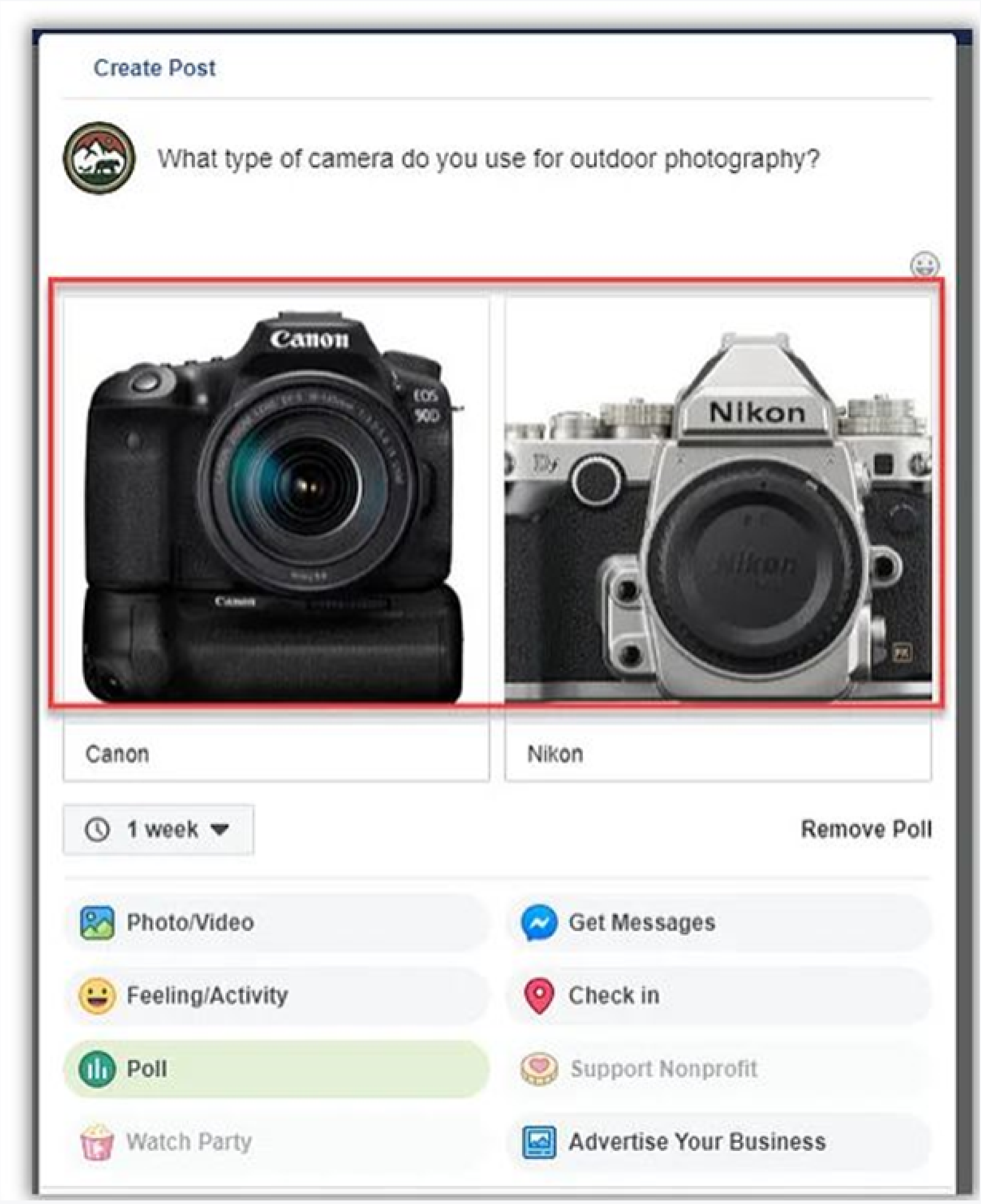
- With texts
- With photos
- With GIFs



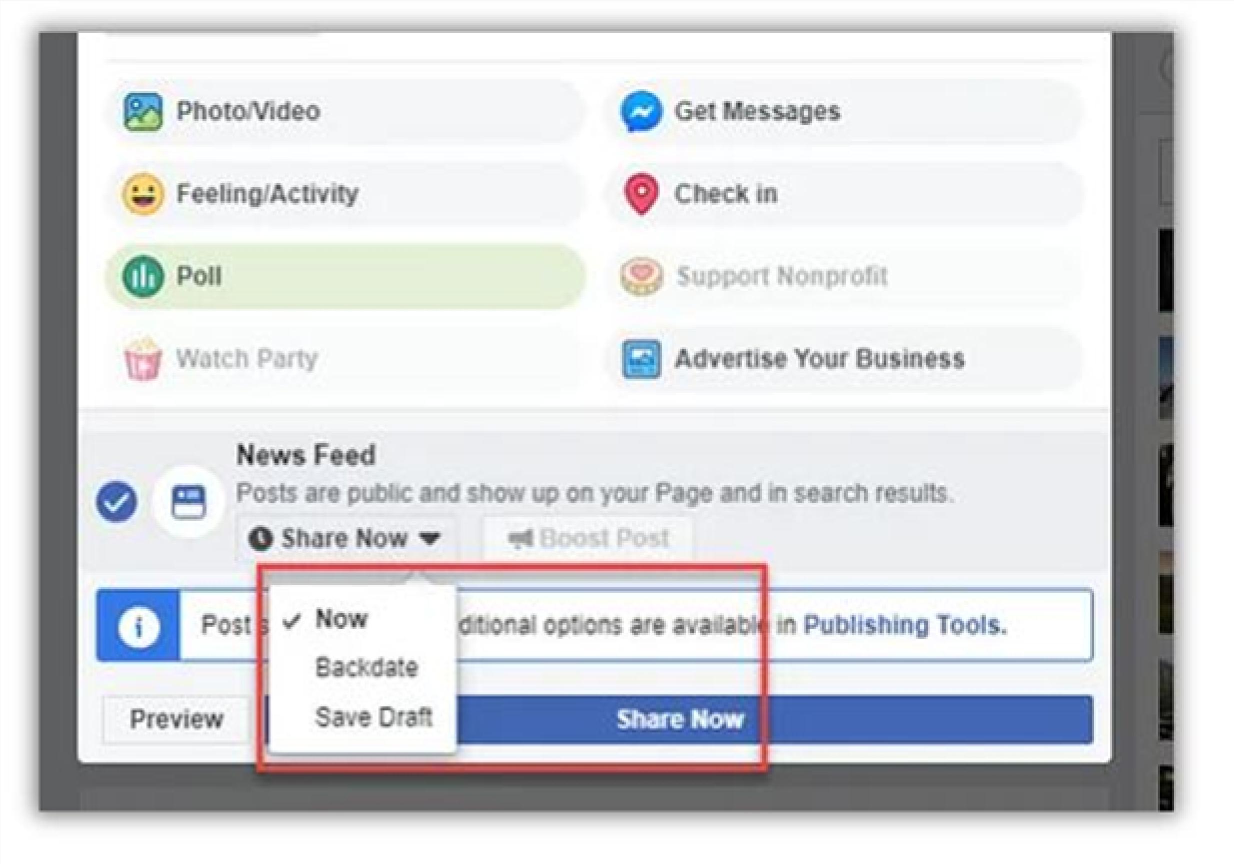
6. Type the question you would like to ask your followers
7. Input two options (Group polls offer more)



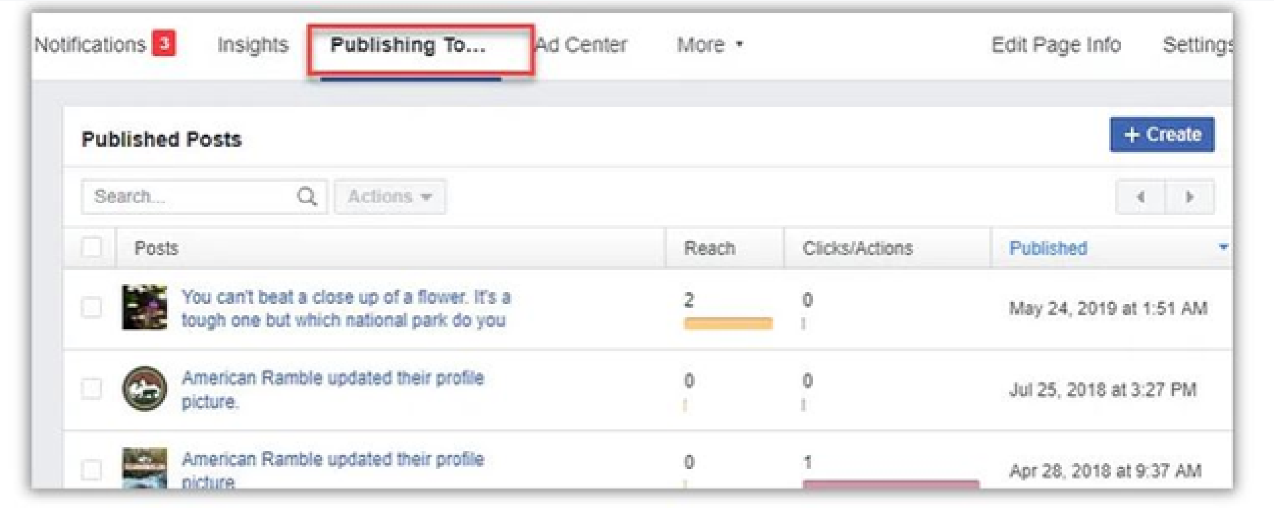
8. Make your poll more engaging by adding photos or GIFs along with the options



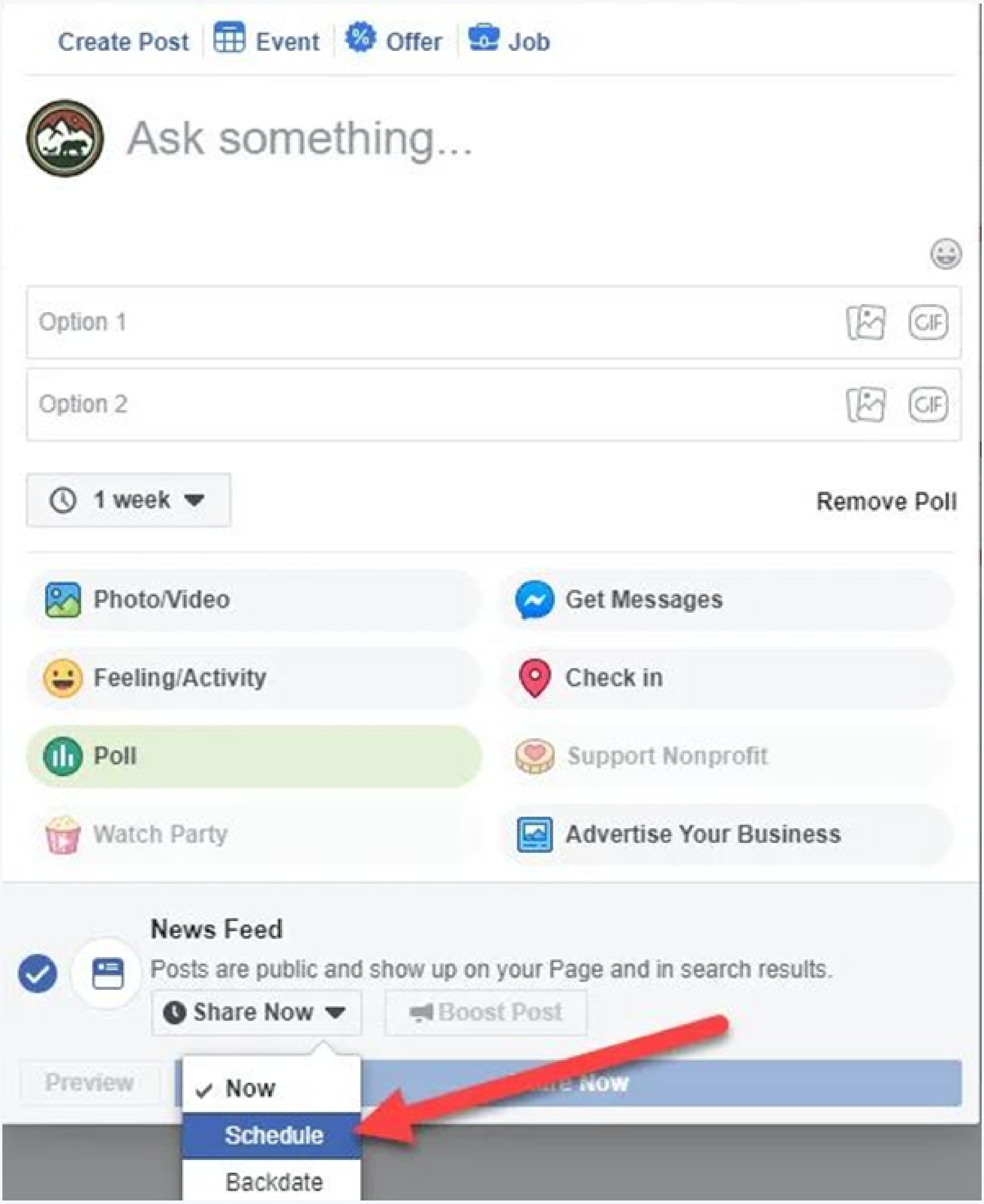
9. Find the Share Now button at the bottom. There are also options to save as a draft or backdate the post



10. If you want to schedule your post for in the future, go to the Publishing Tools tab on your page
11. Navigate to this page, click on the + Create button
12. Now start your poll from scratch, following the above steps from the beginning



13. Click on the Share Now dropdown to reveal the Schedule option



Finding the Right Manufacturers for Your Products and Ordering Samples

What are You Looking for?

The very first step to finding out a suitable manufacturer is determining what type of supplier you're looking for. There are several options open to you. Find the following and choose wisely.

- A manufacturer to produce products of your own idea
- A drop shipper to distribute products and fulfill orders of existing brands and products
- A supplier, distributor, or wholesaler to purchase existing brands and products

Domestic vs Overseas Suppliers

Advantages of Domestic Sourcing:

- Top-notch manufacturing quality and labor standards
- No language barrier consequently ensures easier communication
- Easier to verify reputable manufacturers
- High intellectual property right protection
- Faster shipping time
- Greater payment security

Disadvantages of Domestic Sourcing:

- Fewer product alternatives
- Higher manufacturing costs

Advantages of Overseas Sourcing:

- Least manufacturing costs
- Thousands of manufacturer options to choose from
- One-stop services to navigate suppliers

Disadvantages of Overseas Sourcing:

- Lower perceived quality from customers
- Little intellectual property protection
- Lower manufacturing and labor standards
- Difficult to verify manufacturer and visit on-site
- Longer shipping time than usual
- Language, communication and time zone barriers
- High importation and customs clearance cost
- Cultural differences in business practices
- Less payment security

Where to Search for a Manufacturer

Undoubtedly, the internet is the best place to start. Here we've listed a few places in particular that can help with your search:

- Directories: Free online supplier directories contain profiles of millions of manufacturers, wholesalers and suppliers

- Domestic Directories

+ ThomasNet
+ MFG
+ Maker's Row
+ Kompass

- Overseas Directories

+ Alibaba
+ Oberlo
+ AliExpress
+ Sourcify
+ IndiaMart

- **Google**: The most underrated way to search for manufacturers. Since many suppliers haven't kept pace with the internet or Google's algorithm changes, you need to explore beyond the second page of Google search results

- **Local Library**: Visit your local libraries who pay monthly subscription or membership fees for online business and manufacturer directories. Get registered and enter the world of their directory

- **Referrals**: A good number of leads can come from referrals. Try not to be afraid to ask connections in your networks if they have any recommendations, or if they know somebody who may. Search for people who've gained success in your preferred region to pursue and check if they're willing to share their contacts

Ordering Samples

As a retailer, ordering samples can be your smartest move. To know more about why you need investing in product samples and how you can order product samples, visit here.

Setting a Monthly Budget for Your Business

Budgeting for your business is tied in with making an educated supposition concerning how the eventual fate of your business's finances will look.

- A business budget helps proprietors with deciding whether they have enough money to subsidize operations, expand, and generate income
- Without a budget, an organization risks spending cash it doesn't have, not spending enough to contend, or failing to build an emergency fund
- It is important to review your budget at regular intervals and search for new providers to get a good deal on products or services for your business

How to Create a Business Budget

Below is an easy six-step guide to creating a business budget.

- **Step 1**: Calculate your revenue
  Look backwards at your existing business and sum up all of your revenue
- **Step 2**: Subtract fixed costs
  Some fixed costs are:
  + Supplies
  + Rent
  +Taxes
  +Debt repayment
  +Depreciation of assets
  +Payroll
  +Insurances
- **Step 3**: Determine variable expenses
  Some variable expenses are
  +Utilities
  +Owner's salary
  +Office supplies
  +Replacing old equipment
  +Marketing costs
  +Personal and Professional development
- **Step 4**: Put aside a contingency fund for unexpected costs.
  These costs arise when you're not expecting them, and unfortunately, when the budget is tight. An emergency fund will enable you to survive the crisis
- **Step 5**: Create a Profit and loss statement.
  After collecting all the above information, now focus on creating profit and loss statement that'll give you an overview of your business
- **Step 6**: Framework your forward-looking business budget.
  Regardless of whether you're a new business or owning this a while, anticipating what will befall your business, later on, is educated guesswork. If you've been doing this for a while, that'll definitely help the accuracy of those guesses

MODULE 2 QUIZ

Q1: 'Indirect competitor refers to the businesses that sell similar or exact products or services as you.' True or False

- True
- False

Q2: Which of the following is a free keyword research tool?

a. Similarweb
b. Google keyword planner
c. Ubersuggest
d. Quicksprout

Q3: Which of the following is NOT a step of consumer market research process?

a. Identifying the research purpose
b. Defining your consumers' persona
c. Listing your secondary competitors
d. Interpreting analyzed data

Q4: 'Sourcing products from domestic suppliers ensure greater payment security.' True or False

- True
- False

Q5: 'Kompass' is an overseas directory. True or False

- True
- False

Q6: The last update of Facebook introduced _______ new options while creating polls. Fill in the blank

a. Three
b. Two
c. Five
d. Four

Module 3
Creating a Website, Logo, Social Media Profiles

Introduction to the Module

Wondering about Creating a Website, Logo, Social Media Profiles? This module is going to explore them all. Hold tight and let's dive in.

Topics to be covered in this module:

- Selling products, you want to use Shopify
- Details on how to set up Shopify
- Selling services, you want to use Squarespace
- Details on how to set up Squarespace
- Use NationalWebsiteDesigns.com to build your website and logos on those platforms after signing up for either of them
- Using Canva to create your social media ads
- Details on using Canva to create your ads
- Setting up your social media profiles with the proper branding
- QUIZ

Selling Products, You Want to Use Shopify

Shopify is a hosted platform, comprehensive software built to create online shops. It's mainly a one-stop-shop offering all that you require to sell online. Shopify incorporates the hosting, order management, and anything required for a ready-to-sell online store, by means of some clicks.

Today's statistics show that there are more than 800,000 active Shopify stores on the web, producing not less than $100 billion worth of sales. Since it's an all-in-one solution, Shopify is highly recommended for the individuals who want to focus more on the selling part, as opposed to the technical aspects of creating an online shop.

Since it's an all-in-one solution, Shopify is highly recommended for the individuals who want to focus more on the selling part, as opposed to the technical aspects of creating an online shop.

Besides, Shopify is perhaps the ideal choice for small and new businesses as it gives convenience for individuals who are just starting up, particularly if they have no coding knowledge. Again, even individuals with a coding background still prefer to use Shopify to minimize technical labor and focus their efforts solely into selling and marketing their products.

Details on How to Set Up Shopify

Here we have a step by step guide on how to set up a Shopify store and how to start selling from that store. Visit this link for details.

Selling Services, You Want to Use Squarespace

Squarespace is a SaaS (Software as a Service) for website building and hosting that allows users to use the pre-built templates and drag-and-drop elements to customize a professional business website. The most important thing is, Squarespace websites are built-in mobile-friendly, and there are even some cool features for mobile users.

Squarespace provides their dedicated hosting and security updates, so you need not worry about the technical installation process; they will make it done for your service-based business.

Squarespace can benefit you with the following facilities:

- Opportunity to add various types of content including images, galleries, videos, contact forms, blog posts, podcasts and so on
- Option to sell both digital downloads, services and physical products online
- Easy to copy pages, products, events and blog posts. You can then set templates up and reuse them to save time

- You can sync your website to your social media platforms and can automatically post your new blogs or events on social media when published
- Direct communication facility with prospects and customers via live chat or email 24 hours a day

Visit this link to know more about Squarespace.

Details on How to Set Up Squarespace

Here we have a step by step guide on how to set up Squarespace and how to start selling your services. Visit this link for details.

Use NationalWebsiteDesigns.com to Build Your Website and Logos on Those Platforms after Signing Up for Either of Them

Don't you have enough time to explore those website builders? Looking for a trusted partner who will make all these daunting jobs done for you? Nationalwebsitedesigns.com can be your assistant.

They are providing top-notch web design, development, and management services. Again, they're making your brand logos and becoming your social media marketing strategist. What else are you looking for? Visit their site and pick a package that best fits your business and budget as well.

Using Canva to Create Your Social Media Ads

Canva is basically a graphic design platform that allows users to create customized social media graphics, posters, presentations, documents and other visual content. Users are able to choose from a variety of professionally designed templates, customize the designs and even upload their own photos using a drag and drop interface.

No matter whether you're a new brand just launching or an existing one seeking improvement of your social media strategy – undoubtedly, visual content will help establish and strengthen your online presence.

Around three billion people are active social media users just between Facebook, Twitter, LinkedIn and Google+. So how can you utilize them? The answer is by creating interactive and engaging social media ads.

Canva's social media layouts are fit to be used on Facebook, Pinterest, Twitter, Google+, and Instagram, as well. Canva will give you free access to over 100 layouts, enabling you to create stunning graphic ads in just minutes!

Details on Using Canva to Create Your Ads

Here we have a step by step guide on using Canva to create your ads. Visit the following links for details.

- Creating Canva Account
- Setting Up Your Brand Kit
- Setting Up Your Fonts
- Using Design Folders
- Using Photo Folders
- Downloading Your Designs in The Right File Types
- Creating an Ad in Canva
- Make the Most from Canva for Work
- Know If Your Design Looks Good
- Canva Best Practices

Setting Up Your Social Media Profiles with the Proper Branding

Setting up a social media profile can be a daunting job since each platform has its unique interface and profile requirements.

Below is a step by step guide to setting up your business profiles on Facebook, LinkedIn, Twitter, and Instagram.

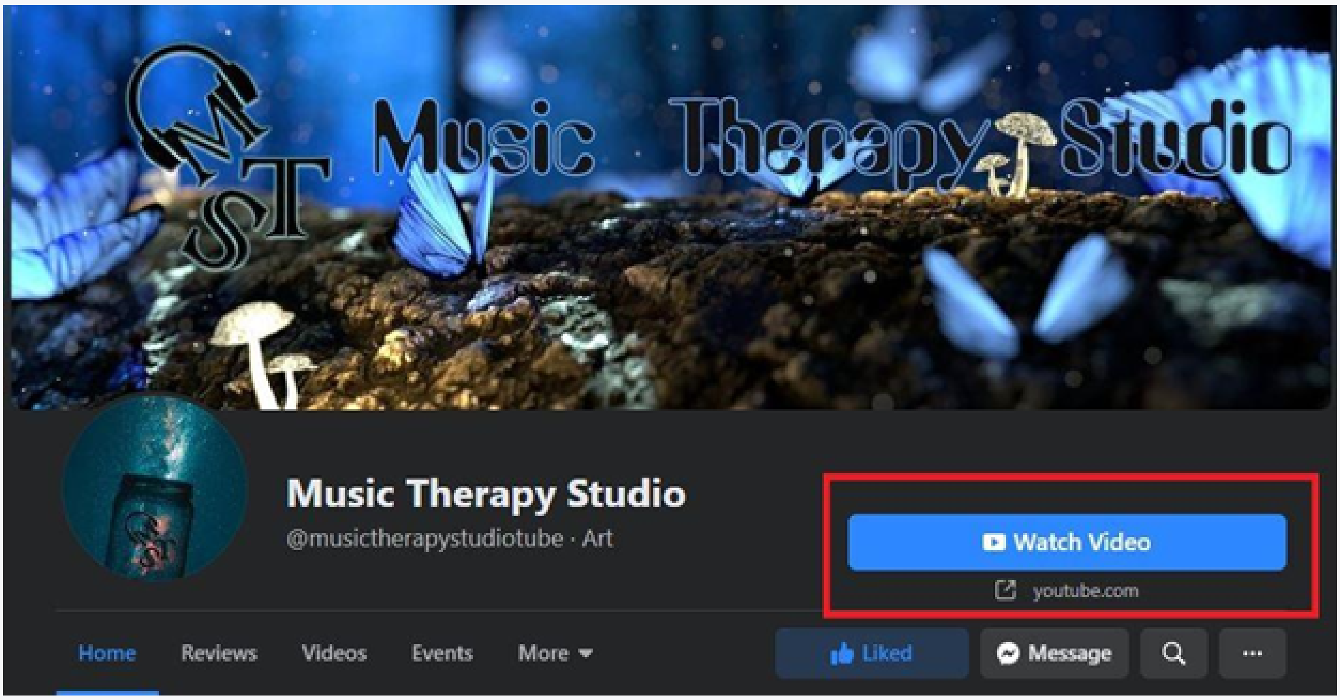
Steps to Set Up Your Facebook Page Profile

Here's what is required to set up a Facebook page

- Profile Photo: Use 170/170-pixel brand logo. Facebook recommends using PNG instead of JPG
- Wall aka Cover Photo: an 820/312-pixel image that best represents your business at a glance
- Page Name: Use your brand name here
- Location: Input the physical location of your outlet or office, if you don't have any, keep it blank
- Hours of Operation: Mention your business hour here
- Type of Business: Select your category based on the niche
- Summary of Your Business: What you do and how your service will add value to your buyers

Create a Call To Action

What action do you want the traffic to take when they visit your page? Will you offer a discount or a free eBook in exchange for email signup that will equip you to retarget that prospect?



Steps to Setup Your Instagram Profile

Start by creating a business account profile and then converting it to a business page. It enables you to:

- Setup a "contact" button on your page so customers can easily reach you
- Enter your business email, phone number and physical location
- Get access to your page's Insights

Here's what is required to set up an Instagram profile

- Logo: 160 x 160 px circle to show off your logo
- Business Description: You will get only 150 words to describe your business, brand or service in brief
- Website's URL: The only chance where you can create a backlink to your website
- Social Accounts: You can connect your other social accounts like Twitter and Facebook

When you've set up a public business account, it's time to convert it to a business page and set up your page profile. Here's the process:

- Log in to your public account
- Go to your account settings with the gear icon
- Click on "Switch to Business Profile"
- Click on "Continue as" to connect to your Facebook account
- Select the Facebook page you want to sync with your Instagram account
- All the data from your Facebook page will automatically be added to your Instagram page
- Make sure your contact information is current so customers can get in touch with you

Steps to Setup Your Instagram Profile

If you want to create a LinkedIn company page, your personal LinkedIn profile have to meet the following requirements, besides others:

- Minimum of seven days old profile is a must
- Present employee of the company and the company position must be listed on your profile
- A verified business email need to be added on your LinkedIn account

Here's what is required to set up a LinkedIn company page

- **Company Page URL:** It can't contain more than one consecutive hyphen or begin or end with a hyphen. Minimum one non-numerical character is a must
- **Company Description:** You need to write a minimum of 250 characters and can't exceed 200 characters including spaces
- **Brand Logo:** Highly recommended to be 300/300-pixel
- **Cover Image:** Recommended to be 1536/768-pixel

To learn more about the LinkedIn profile and business page, visit LinkedIn Learning.

Steps to Setup Your Twitter Profile

Here's what is required to set up a Twitter profile

- Profile Picture: Use your logo here. Size should be 400/400-pixel
- Header Photo: 1500/500-pixel photo is standard for this box
- Username: Formatted like @yourcompanyname
- Description: You have only 160 characters to describe your elevator pitch. SEO keyword matters here

Find out more about building a strong profile and create a following on Twitter Basics for business.

MODULE 3 QUIZ

Q1: 'Shopify has its own official theme store.' True or False

- True
- False

Q2: What is the 2nd step to building your first Squarespace website?

a. Signing up for Squarespace
b. Using Squarespace design options
c. Knowing how 'Pages' work in Squarespace
d. Exploring the Squarespace settings

Q3: What is the dedicated button to enter the required ad size in Canva?

a. Use Custom Dimensions
b. Customize Ad Size
c. Customize Dimensions
d. Use Custom Pixel Ratio

Q4: What is the recommended pixel ratio of Instagram logo?

a. 170/170
b. 400/400
c. 200/200
d. 160/160

Q5: Shopify domains typically cost ______ USD per year. Fill in the blank

a. $10
b. $9-$14
c. $12
d. $10-$18

Module 4
Advertising and Marketing

Introduction to the Module

Wondering about creating an advertisement in several web platforms? Or wanna hire an employee from Fiverr? This module is going to explore them all. Hold tight and let's dive in.

Topics to be covered in this module:

- Google Ads Manager
- How to create a Google Ad
- Target the right audience.
- Set up the right pricing and budget
- Facebook Ad Manager
- How to create a Facebook Ad
- Target the right audience.
- Creating a lookalike audience to retarget people more likely to buy.
- Set Up the Right pricing and budget
- Fiverr
- Hiring someone to set up your marketing.
- QUIZ

Google Ads Manager

Google Ad Manager is a cloud platform of ad management for large publishers who have a significant amount of direct sales.

Google Ad Manager provides very composite and granular controls and supports for multiple ad networks, Ad Exchange, including AdSense, and other third-party networks.

When you need Google Ad Manager:

- A One-stop virtual place to monetize all of your inventory types (websites, mobile apps, videos, or games)
- To organize and manage ad revenue that comes from direct sell from your audience or customer.
- To use such a third-party network which can assist you in competing for ad inventory
- To achieve granular or microscopic insights for your web platform

AdSense or AdMob might be a better option for you, depending on the advertising business you need to manage.

You can Learn more in Compare Ad Manager, AdSense, and AdMob.

How to Create a Google Ad

Here's how to create a manager account:

1. Visit the homepage of Google Ads Manager and click on "Create a manager account".
2. If you already have an account, then log in. If you don't have an account, create one using your preferred email.
3. Up to 20 Google Ads accounts (including manager accounts) can be created by a single email.

   To learn more about multiple accounts, click on the link below

   Associating Multiple Accounts.

4. Create a name for your manager account. This will be the name that your clients will see in their "client account".

5. Choose how you plan to use the account, You have two option,

a.) Use as an account to manage your own multiple Google Ads accounts or

b.) Use to manage other people's accounts.

6. Do not forget to select your country name and time zone. Your account reporting and billing will use your timezone, and It can't be changed further. So, choose your time zone wisely.

7. Choose a permanent currency for your account.

To learn more about currency selection click the link below,

Converting Currencies in Your Manager Account.

8. Select "Explore Your Account" to explore.

You are done, you have opened an account on Google Ad.

To learn more, you can visit these official links:

- About Google Ads manager accounts
- About linking accounts to your manager account
- Link accounts to your manager accounts

Target the Right Audience

Your planned ad can be shown to specific audiences based on,

1. Their gender?
2. Their habits, as well as interests.
3. What they are actively searching for?
4. How they are interlinked with your goods and service?

Simply following some step-by-step instructions, you can achieve the ability to show your ads online to those people who have specific interests in your service!

Targeting the right audience, you can help your business to reach the right customers.

In Google Ads, It can be done by adding audiences to your ad groups. Audience targeting is not available for all campaign types, and it can vary.

If you are interested in knowing how to add audiences to your ad group or campaign and how to copy those audiences from one ad group to another, then click the link given below.

To learn more about targeting the right audience, click the link below.

Target the Right Audience

Set Up the Right Pricing and Budget

One should be wise enough to set up the pricing in Google Ads. Be careful about your budget and do some research on this.

Analyze your existing budget to see if there are any gaps or wasted spend that you can use. When you want to use a platform like Google Ads, you can't do it without money.

First, analyze "how much the keywords related to your business are going to cost."

This will provide you with an idea of how much money you'll need to set aside for Google Ads.

Secondly, analyze "how much Google Ads cost."

Once you've done that, you can conduct a simple, quick audit of your existing budget:

- Where is your money currently going?
- What platforms are you using currently?
- What are specific marketing tools that cost you money without expected results?
- Can you cut out some extra time, weekly from a task to save your labor costs?

After researching all those, you will be able to determine or set up the right pricing and budget.

If you are interested to know more on:

"How to Set up the right pricing and budget?" Or **"How one can Audit their Google Ads Budget?"**

Then Click the Link Below:

Analyzing Your Google Ads Budget

Facebook Ad Manager

Facebook Ads Manager is the ground floor for running ads on Facebook, Instagram, Messenger, or Audience Network.

It's an all-in-one machine for creating ads, managing those ads. When and where they'll run, and tracking how effectively your ad campaigns are performing.

Facebook Ads Manager is a powerful web platform for various business organizations. It's also a great ad management tool and it's very user friendly-which means it's designed for advertisers of any experience level.

How to Create a Facebook Ad

Facebook Ads Manager is a well-organized and unified ad building tool that you can use to make and publish ads to Facebook, Instagram, Messenger, and other Audience Network.

Step by step Guide:

1. Open your business page then go to the blue button on the bottom left corner.
2. Then choose what you want your ad to help you do! Select your preferred Ad service.
3. Add an Image or video and a simple eye-catchy text and select your audience.
4. To select an audience, tell Facebook whom you want to reach. For example, you can fix the gender, age range, region or set the location.
5. Confirm the budget, then select how you want to pay. Once you complete that process, wait for the review process of Facebook; Facebook will check if your ad breaches any of the ads. The policy of them!

You are done!

To learn more about Understanding Facebook Ads Manager click the link below

Understanding Facebook Ads Manager

Target the Right Audience

Your Facebook Ad can be shown to specific audiences based on,

1. Their Age and Gender.
2. Their habits and interests.
3. Their Search History.
4. Their Living location from your business space or shop.
5. How they are interlinked with your goods and service.

Wisely choose the factors when you go for the Facebook Ad.

You can choose different radiuses, like 10 sq. kilometer from your business location or all over the state or country you live.

Creating a Lookalike Audience to Retarget People More Likely to Buy

A Lookalike Audience is a process to reach new customers or new people who are likely to be interested in your good or service provided by your business because they're similar to your best existing customers.

Read more about Lookalike Audience.

Understanding lookalike audience

1. To create a Facebook Lookalike Audience, you must be the admin of the page you are going to use for your business.
2. If you want to make a Lookalike Audience from a Custom Audience, you need to have the access as Admin, Advertiser, or Analysis on the Ad account.
3. To build a Lookalike Audience from mobile app installs information, you have to take the access as Administrator or a Developer role on the app.

If you are interested to know more about "How to create a Facebook Lookalike Audience" click the link below:

A to Z of Facebook Lookalike Audiences

Set Up the Right Pricing and Budget

To set up the price,

1. See the packages provided by Facebook.
2. Analyze which is suitable for you.
3. Choose such a package which is affordable and efficient for your business.

Fiverr

What is Fiverr?

Fiverr is an online-based marketplace for freelance services with low-cost sellers from all over the world.

The idea behind Fiverr is to automate the process of getting hired or hiring a freelancer anytime.

How Does Fiverr Work?

Fiverr works by,

1. Categorically differentiate the seller or freelancers, and there are two ways to be a visitor of this site, either as a freelancer or a buyer.
2. Generating a system by which buyers pay in advance for "gigs".
3. At the very beginning of Fiverr, all gigs' price were 5 US dollars, but now freelance sellers can decide the price based on the quantity and quality of service.
4. Fiverr provides the freedom to sellers to select a specific time for their service delivery, but custom orders can be placed where time can be increased and decreased.
5. Fiverr Orders are typically completed within a day or two, but can sometimes take as long as 5 or 7 days. The delivery time is set by the seller and can take longer if the seller has work pressure orders.
6. When a specific order is completed, usually the seller will receive 80% of the value of the total order. For example, a freelancer will receive $4 from the order of 5$.

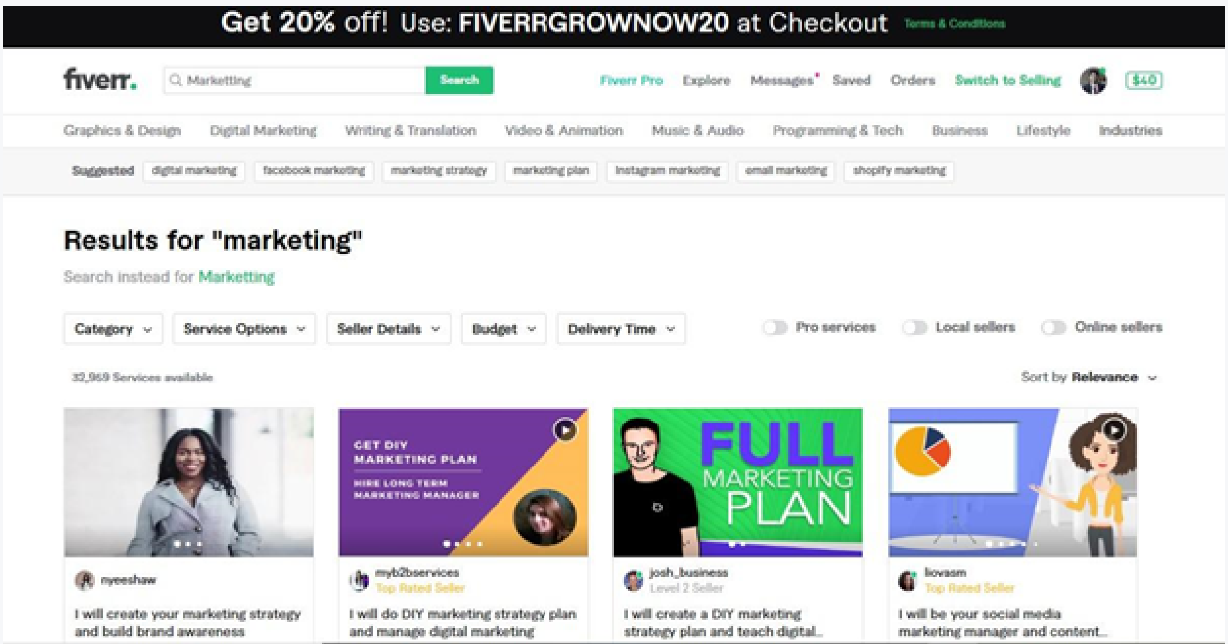
Some Important Fiverr Terms

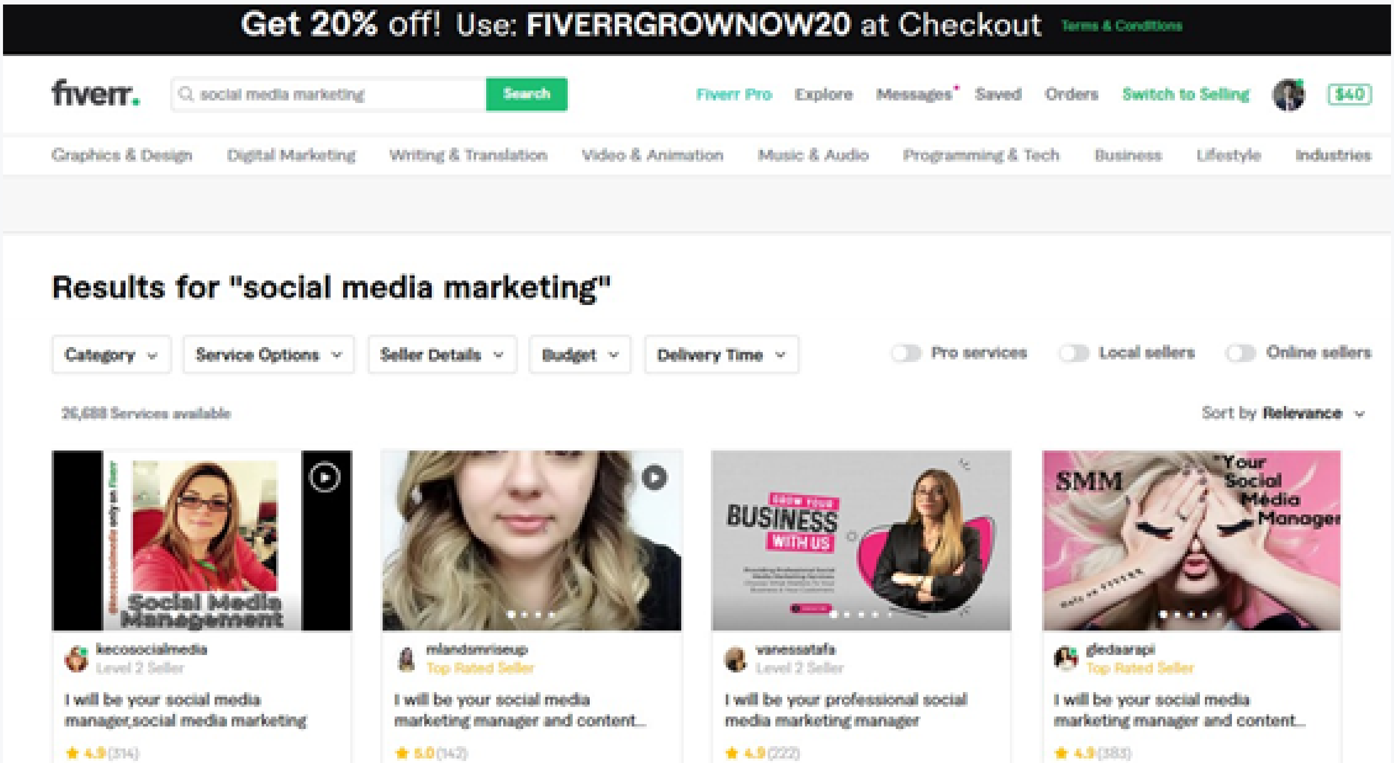
- **Gig:** A service offered by the freelancer on Fiverr's website. Gig example: "I will manage your social media marketing."
- **Seller:** A registered user (freelancer) who will offer you service through their Gigs.
- **Buyer:** A registered user who can purchases service from the seller's Gigs (Purchasing a service from a Gig can be called as order).
- **Post a Request:** All the buyers can request for services (Gigs) based on their specific need.

Hiring Someone to Set Up Your Marketing

It is very easy to hire someone for your social media marketing.

1. Open an account in www.fiverr.com using your personal or business email
2. Go to the search bar of Fiverr
3. Write "Marketing" or "Social Media Marketing"; They will show you many gigs.
4. Check out some gigs, you can choose the Top-rated seller or level one seller as per your demand and budget contact with a freelancer.
5. Explain what do you need and then, finalize the deal by ordering at his/her gig. Hiring from Fiverr Done.





MODULE 4 QUIZ

Q1. What is Fiverr?

a. Online-based marketplace
b. Shopping website like Amazon
c. Construction Firm
d. Digital Marketing Company

Q2. Which is correct to target the right audience using Google Ads and Facebook Ads?

a. Based on the audience's gender and age
b. Based on the audience's habits as well as interests,
c. Based on what they are searching
d. All of the above

Q3. Which action is used to set up the Right pricing and budget for their ads?

a. Analyzing the packages provided by Ad. management service
b. Analyze the suitable package for them
c. Checking the affordability and efficiency of their business
d. All of the above

Module 5
Creating a System that Works and Collects Leads

Introduction to the Module

This module will discuss a few Customer Relationship Management (CRM) platforms and marketing automation software that works and collects business leads. If you are seeking support regarding LionDesk, Zapier, Mailchimp, and Hubspot then hold tight, and let's start.

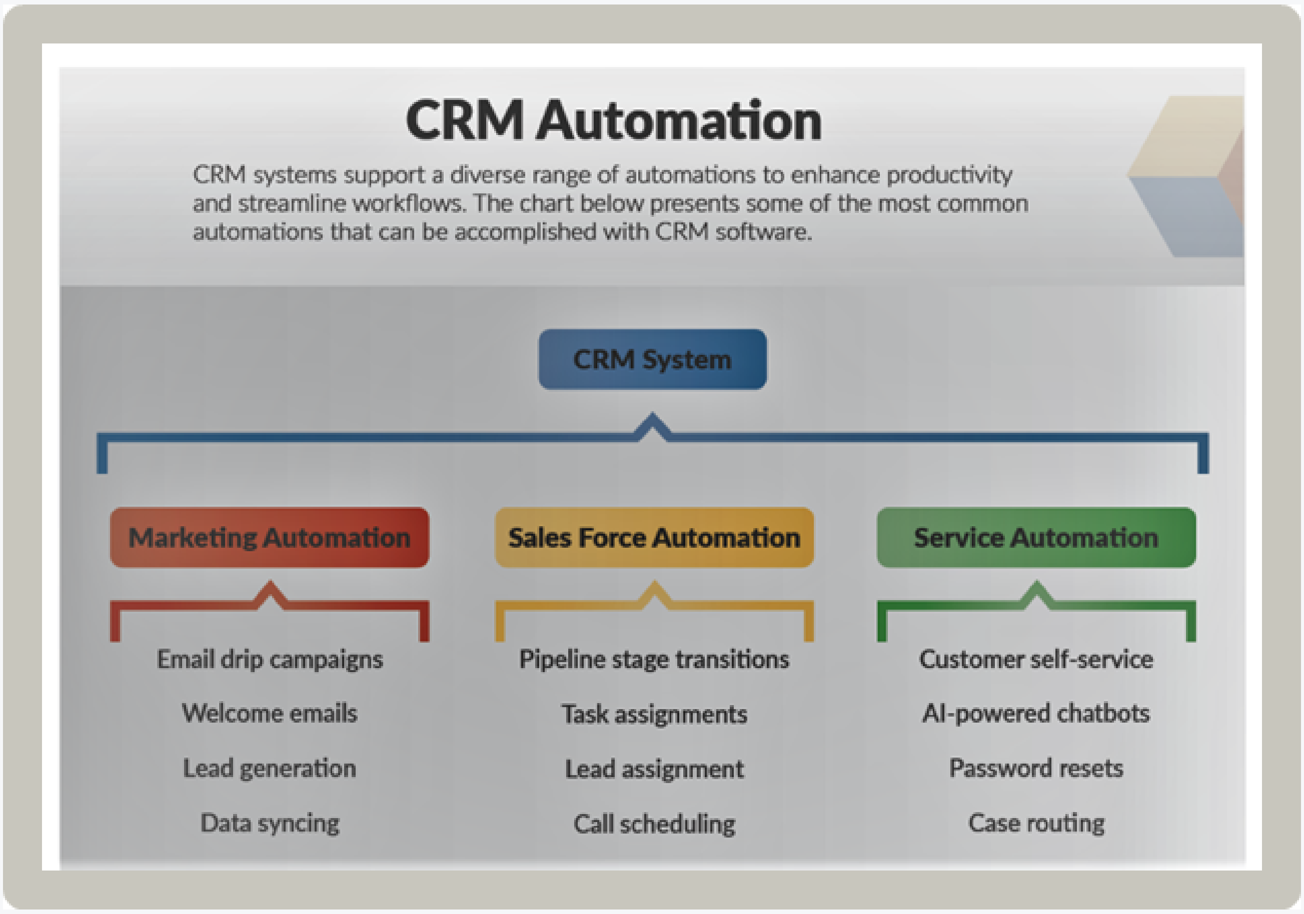
Topics to be covered in this module:

- What is Customer Relationship Management Automation Tool?
- Fundamental Functions of CRM of Automation Tools:
- Importance of Automation Tool
- What is Liondesk?
- How to set it up?
- What it's used for?
- What is Zapier?
- How to set it up?
- What it's used for?
- What is MailChimp?
- How to set it up?
- What it's used for?
- What is Hubspot?
- How to set it up?
- What it's used for?
- QUIZ

What is Customer Relationship Management Automation Tool?

Customer Relationship Management (CRM) automation can be defined as the operation of automated customer service, and sales functions to help the company or organization to manage and track down their engagement efforts with current as well as prospective customers.

It enables the sales team to rescue their time, flourishes their leads, and convert those leads faster by automating tedious sales processes.



Flowchart © Select Hub

Fundamental Functions of CRM of Automation Tools

1. Contact management

2. Lead management

3. Documentation management

4. Integration

5. Reports and analysis

Importance of the CRM Automation Tools

- CRM Automation Tools Save Your Time:

Your important Campaigns can be run ahead of time, which means you can channel your working schedule into other projects. CRM automation tools will make it possible to work with other platforms, using a well-processed marketing automation system.

- Increases Company Productivity

Marketing automation software frees up your marketing executive's time. When time gets saved, then the capacity to brainstorm new ideas gets increased as well as boost up your company productivity in other areas.

- Provide Personalization Facility

Automation allows you to personalize everything and it will provide you with an experience of creating a well organized and unique user experience for each customer, which will increase your client and customer engagement and boost your sales.

- Ensure Multichannel Campaign Management

Keep track of all your general and important campaigns across all your business and marketing channels from a single platform.

- Make Sure a Consistent Tone of Voice & Improved Return of Investment

By consolidating all your marketing campaigns in a CMR platform, you can wisely and efficiently ensure a fixed tone of voice when to take an approach to reach your clients or customers.

By specific customer targeting methods, CMR automation tools help you to improve your return on investment.

To learn more about CRM Automation & How CRM Automation Can Benefit You Click on the link below:

[To know more about CRM Automation.docx]

LionDesk, as an Automation Tool

What is LionDesk?

LionDesk is a combined CRM (Customer Relationship Management) platform for sales professionals. It's a marketing automation software system designed to save time and increase efficiency by client interactions. It's very user-friendly. Here we'll discuss the steps to set it up, it's uses, and it's automation tools.

How to Set it Up

First, sign in to your LionDesk account. If you don't have an account, you can sign up for one and they even offer a 30-day free trial!

Here's a step by step description of how to set it up:

1. Import contacts:
It is necessary to stay connected with all persons related to business. For this, you need to import all your contacts. In the right top corner of the homepage, click on your account name and select "Profile". On this page, you'll see a table showing LionDesk contacts. Then select "Import New Contacts". In this step, following CSV format is a must.

2. Personalize contacts to search easily:
Click "Contacts" right under the "Home" option. You'll find all of your contacts enlisted. To customize any contact, click on the client name. You'll get all the information.

You can personalize your contacts alphabetically, by frequent contacts, tags, or many different categories to find it quickly.

3. Combine all lead sources:
Securing leads will help to add those to all contacts. LionDesk does this by three methods; API Keys, Email Parsing, Zapier. You can use any of these to use for your lead source provider.

When leads are secured in LionDesk, you can easily set them up and LionDesk will handle all the new leads.

4. Create your signature:
First go to "Profile", select the "Edit" option. You can write it or paste it from previous emails. Then click "Save".

5. Validate your phone number:
To get notified about new leads on your phone or to use call and text features, validating your number is important.

Go to "Profile" and insert your phone number, select "Click Here to Validate Number....". After receiving the verification call, you need to type the verification the number on your phone.

6. Manage subscription through a custom phone number:
To use all the text and call features, you'll need to purchase a phone number to manage subscriptions. With it, your account gets an unlimited amount of free texts from a limited area code.

7. Send a mass email:
Go to "Contacts". Choose the clients to whom you want to send an email. Click on the option named "Bulk Actions", then select the "Email Selected Contacts" option. From there, you can then write your message and send it through email.

8. Send a bulk text:
This follows the same steps as step 7. Just go to "Bulk Actions" then "Text Selected Contacts".

9. Explore drip campaigns:
This helps to send a prewritten message to all clients. Go to the "Marketing" tab. You'll get the "Auto Pilot" Drip Campaigns" section.

LionDesk has some premade campaigns. You can use these directly or edit them before using them.

10. Close your deal:
Go to "Properties" and input all information about your business. In the "Deals" section, you can categorize and describe those. Clients will have a look at your deals.

What is it used for?

LionDesk is an ALL IN ONE solution to get rid of the struggles of a business professional;

- To make sales,
- To interact with clients,
- To make business attain the highest growth.

It is mainly used for automated testing and emailing when receiving new leads.

Learn More about Liondesk, Click on the link below:

More about Liondesk

Zapier as an Automation Tool

What is Zapier?

Zapier is an automation platform that connects several different business apps. It doesn't require any coding knowledge. It's very simple to use and has many advanced features. Here, we'll discuss it's set up steps, it's uses, and it's automation tools.

How to set it up

Zapier is a free tool for up to specific Zaps (the combination of different applications). First sign in to your Zapier account. If you don't have one, you can sign up with your Google account.

Here's a step by step description of how to set it up.

1. After signing up: choose your role, industry, and the number of employees in your company.

2. Click "Continue" and you'll see a page showing 2000+ applications.

3. Click "Finish".

4. Now you will see a page entitled "Create your workflow". In the left corner of the page there are an option "Zaps". Click it and select "Create Zap".

5. Give a name to your zap.

6. Choose an app for the option "When this happens...." and choose an event from given events. Sign in to that app.

7. Choose an app for the option "Do this...." and choose an event from given events to get the responses of changes that happen in another app. Sign in to that app.

8. Fill in the required fields.

9. Click "Continue".

10. Click "Finish", and you are done with your zap for business.

What is it used for?

If you run a business, you must deal with lots of different software. It's difficult to use them separately. So, a business professional feels it's necessary to connect them all. Zapier is used to make an interlink across these services. You can combine multiple softwares into one Zap.

Learn More about Zapier, Click on the link below:

More about Zapier

Mailchimp, as an Automation Tool

What is Mailchimp?

Mailchimp is a tool for small businesses to interact with clients and customers. It's mainly an email marketing app. Mailchimp brings a huge change in any business as they get a higher reach to many people. It is simple and easy to use. Mailchimp can store around 2,000 email accounts and send 12,000 emails with a free account. Here we'll discuss it's set up steps, it's uses, and it's automation tools.

How to Set it Up

Mailchimp is a free tool. First, sign in to your Mailchimp account. If you don't have one, you can sign up with your Google account.

Here's a step by step description of how to set it up.

1. After signing up, go to Mailchimp Dashboard.

2. Select "List" then "Create a list". Fill in all the required fields. Click "Save".

3. Select "Import subscribers". You can choose your preferred text files. Click "Next".

4. Select all email addresses and paste to the "Paste subscriber info" table.

5. Categorize the imported subscribers.

6. Create a template. Then click on the option named "Templates" then select the "Create a template" option.

7. Select a starting point for your template. Select any one category.

8. Fill in all the required fields. Click "Save & Close".

9. Name your template and save it.

10. Select "Create campaign" by clicking the drop-down button beside the edit option.

11. Choose a list to whom are you sending it.

12. Give campaign information. Click "Next".

13. Review the feedback before sending your campaign, and you are done.

What is it used for?

Mailchimp is generally used for social media marketing. If a company wants to advertise its product, they can just select some email accounts and introduce those to that product.

To Become an Expert about Mailchimp, Click on the link below:

More about Mailchimp

Hubspot as an Automation Tool

What is Hubspot?

Hubspot is a powerful business tool like Mailchimp. It helps to notify customers about the product's value, quality, promotions. Hubspot connects business professionals and their clients.
Here we'll discuss it's set up steps, it's uses, and it's automation tools.

How to Set it Up

Here's a step by step description of how to set it up.

1. Getting started:
Go to the webpage of Hubspot and select "Get Free CRM". Add personal details. Click "Next". Set up a new account. Go to the sign-in page. Sign in with Google. Add details about the company. Finish sign up. Choose a demo.

Start an interactive demo. (You can skip it) Get started with free Hubspot CRM.

2. Hubspot dashboard:
Select "Import Contacts". You get all information about the contacts.

3. Connect email account:
Go to settings, select "Integrations" then "Email integrations". Select "Connect an inbox". Choose your email provider. Click "Connect your inbox". Click "Continue" and choose an account.

4. Add contacts:
Go to contacts and select "Create contact" and add all required information.

5. Add team member:
Click on the contact of a particular client, and you'll get to see all activities. Go to Contacts again. You can add more filters if you want.

6. Import contacts:
Select "Import" at the right top corner. Go to settings and go down to the left side and click on "users and Teams". Create a new user. Click "Send". Go to Marketing, and select "Ads" then connect accounts. Go to Marketing again and select "Emails" and get started.

7. Create deals:
Go to sales and click on "Deals" and create your deal.

8. Create tasks:
Go to Sales again and click on "Tasks" and create a task.

9. Manage meetings:
Select "Meetings" on the Sales tab. Connect your Google calendar to manage meetings.

10. Create tickets:
Go to Service and select "Tickets" and create tickets.

11. Library dashboard:
Go to Reports and select "Dashboard". Here you can manage your dashboard. And you can get started!

What is it used for?

Hubspot is a time-saving business tool. You can send 2,000 emails per month, create 25 static and 5 smart lists, review basic reporting and more. It is a time-saving tool. Hubspot CRM helps businesses to collect leads and analyze business metrics.

To Learn More about Hubspot, Click on the link below:

More about Hubspot

MODULE 5 QUIZ

Q1. What is an all in one solution to get rid of business struggles?
a. Hubspot
b. LionDesk
c. Mailchimp
d. Zapier

Q2. Which one is both a CRM platform and marketing automation software?
a. LionDesk
b. Hubspot
c. Mailchimp
d. All of the above

Q3. Which software is used to interconnect multiple different apps?
a. Hubspot
b. LionDesk
c. Zapier
d. Mailchimp

Module 6
Outsourcing

Introduction to the Module

This module will provide information about digital marketplace platforms and outsourcing websites that will help you to hire part-time or full-time employees on a contract basis. We will discuss Fiverr, Upwork, Onlinejobs.ph as well as provide you with a clear idea about the Paypal payment method, employee communication system, and work tracking method using Hubstaff.

Topics to be covered in this module:

- What is Outsourcing?
- Where to Outsource online jobs?
- The Importance of Outsourcing to scale your business
- Onlinejobs.ph
- How to Create a Job Posting on Onlinejob.ph
- Pay Scale
- How to pay your employees (using Paypal)
- Use Skype effectively to communicate with your employees
- Tools to Manage your virtual employees
- Timekeeping & screen monitoring tool: Hubstaff
- Managing your employees via Hubstaff
- How to set up Hubstaff

What is Outsourcing

According to Investopedia "Outsourcing is the business practice of hiring a party outside a company to perform services and create goods that traditionally were performed in-house by the company's employees and staff. Outsourcing is a practice usually prioritized by business organizations as a cost-cutting tool."

Simply put, outsourcing refers to the system of getting the job done by someone who is not your office employee, but who works for you as a freelancer as per your requirements.

Where to Outsource Online Jobs?

What is an online job? The answer is simple; an online job is any job where someone who has skill or specialization can work from home or a remote location. It is not mandatory to report daily to an office location. Online jobs are becoming more and more popular as technology and the internet has reduced the global distance and connected the whole world in a cloud base workstation.
There are so many Online Marketplaces or Outsourcing Websites where you can outsource employees.

- Amazon's Mechanical Turk
- Airfleet
- Creativemarket.com
- DesignHill
- Gigster
- Guru
- Freelancer.com
- Fiverr.com
- Onlinejobs.ph
- Toptal
- Upwork.com
- Writer Access
- 99 Designs

Understanding Onlinejob.ph

Onlinejobs.ph is an Utah based website founded by John Jonas and it's goal is to provide Filipino Virtual Assistants (FVA). This site provides outsourcing hiring facilities and opportunities for anyone in need of assistance.
John was an ordinary business owner who was facing "hustle and grind" to make his online business a success. First, he made a job posting channel to hire a Filipino Virtual Assistant with no skills in 2006. Through the trial and error process, he discovered how proficient this employee was. When he faced a higher demand for FVAs, he made a job board to make the process simple for Filipino job seekers, entrepreneurs, and small business owners to connect.

Onlinejobs.ph Full-Time Staff

As usual, staff who work more than 35-40 hours per week can be considered as "full-time" employees if and only if you hire them permanently for your business or company. There are still some criteria based on state law and office regulations.
Generally, full-time staff would get:

Basic Salary or Base salary according to the job contract (Your Mentioned Compensation while you posted the job in onlinejob.ph)
Bonuses (For example, Festival bonus, Sales Bonus, Performance Bonus or KPI Bonus)
Salary Review opportunity after six months or after every 12 months (Based on Inflation and Performance).
Different Allowance (Such as Travel Allowance, Treatment Allowance, Food Allowance, etc.).
Government Holiday, Vacation, Sick Leave, Emergency Leave, Annual Leave, etc.

These 5 points will be applicable if you recruit someone as a permanent employee and if you mention all these opportunities in your job post.

Onlinejobs.ph Part-Time Staff

Part-time staff work on an hourly rate basis, and they do not get all the official opportunities like permanent or full-time staff. For instance, part-time staff would not get bonuses, salary or per-hour working charge review opportunity, different allowances, government holiday, vacation time, sick leave, emergency leave, or annual leave.

Typically, salaried staffs are full-time because they are professionals and managers, but a salaried staff member could also be part-time if they are in a job-sharing situation.

Simply put, a part-time staff member works less hours than a full-time staff member. It can also simply be a worker you have hired to perform tasks that can be done under 40 hours a week.

What is One-Off Project?

The one-off can be referred to as something that happens only once. An example of a one-off is an experiment or taking a service that works out once.

Understanding Upwork One-Off Project

Upwork is a global outsourcing platform where many professional freelancers get themselves connected and collaborated. This company has more than 2 million skilled workforces from all over the world, providing freelancing services in 100s of service categories.
Upwork One-off Project Policy will,
Let you post your specific job or project with the requirements on their website.
Provide specialist freelancers in that field of work and shortlist suitable candidates for you.
Options to search for different freelancers on their website.

Understanding Fiverr One-Off Project

Fiverr can be counted as the world's largest marketplace to hire freelancers for your jobs, regardless of the niche or industry you operate in. Fiverr provides you access to millions of gigs from a massive number of freelancers residing in over 200+ countries.
Fiverr's one-off policy is buyer friendly and their freelancers are providing a lot of services at unbeatable prices.

They have more than 3 million gigs in 150+ service categories starting at just 5 US Dollars. It is the directory of Freelancers. Every buyer and seller gets the opportunity to rate and review the freelancer he has worked with. So, it provides mental satisfaction to buy and sell on Fiverr.
Fiverr's one-off project system will

- Let you post your specific job or project.
- Allow you to search the freelancer by categories.
- Provide specialist freelancers, according to your demand.

The Importance of Outsourcing to Scale Your Business

It is a bit hard to explain the importance of outsourcing with just a few sentences.

1. Freelancers or outsourcing labor can help to focus on your core Business Priorities.
2. You can expand your staff by hiring freelancers from various outsourcing sites.
3. You can save your money by outsourcing. If you worry about the cost-benefit analysis, then outsourcing could be a great solution for you. You can take an expert's help at a very affordable rate.
4. Resources are always scarce in small businesses, so you can unitize your resources efficiently if you take help from outsourcing sites.
5. Outsourcing is a great option for you to ensure smooth growth. You can find cheaper solutions for expensive problems or challenges. You can manage things like human resources or customer service, designers, telemarketers, and marketing specialists.

6. Culture is a significant advantage for various small businesses. Outsourcing can ensure cultural diversity within your company or business; this diversity will encourage growth and expansion.
7. To enhance your company's customer experience outsourcing could be a great solution for you.

How to Create a Job Posting on Onlinejobs.ph?

Where Fiverr and other freelancing/outsourcing platforms charge a high rate, Onlinejobs.ph charges you a flat monthly fee that is reasonable. All transactions between buyer and seller that happen outside the platform, have no added fee. Which means you're not paying for an added middlemen or markup on their salary.

How much does Onlinejobs Charge?

Anybody can hire staff from onlinejobs.ph by giving a filtered search of virtual assistants on their website according to what or whom do they need, They can search

- Based on Employment type (Full-time, part-time, or contract).
- Based on Monthly salary ($150-$2,000 per month).
- Based on the ID Proof score.
- Last but not least, the Last active time.

How to Hire Someone from Onlinejobs.ph

1. **Website Login:** Simply go to the website and open an account by clicking on sign in (If you have no previous account).
2. **Signing In:** Do not forget to sign in as an Employer.
3. **Post a Job for your work:**
   Post your job providing,
   - Job Overview
   - Job Responsibilities
   - Required Skill
   - Mention Required Hours and Compensation

4. Learn how to search manually: Manually search the resumes and find a suitable staff member for your business. You will get a lot of freelancers that are waiting to grab your job. Find someone you feel is best by reviewing their profile, checking their work quality rating, per hour rate and feedback of those that hired them.

5. Communicate with some Freelancers: Communicate with them and tell them what you want, how you want it and when you want it.

6. Get Engaged with the Right Person: Find out if the contacted person is correct for your job or not. Then, offer them a job if you feel he or she is suitable for your job.

7. Negotiate: Negotiate with the freelancer about salary, working hours and your demand and expectations. If anything wrong happens with your freelancer or virtual assistant in the first month, onlinejob.ph will find you a replacement at no additional cost.

8. Get Your Job Done: Hire and manage your staff and pay them after the job is done.

Hiring Process from Fiverr and Upwork

Hiring freelancers is not as easy as one may think. Great in-house labor doesn't necessarily mean a great freelancer has to be hired. When you decide
to hire any digital nomad, it is crucial to examine their communication skills, ethics of completing a project, and time management skills.

It is very important to hire a qualified employee to grow and develop your business. But this hiring process is not a joke as mentioned earlier. In this case, both your time and patience are essential. Determining the right freelancer for your business goes through a whole process. Fiverr and Upwork are such platforms, where one can find employees available for their deal.

Hiring from Fiverr:

Fiverr is a marketplace where you can find compatible freelancers with various price available for your business.

1. Examine Thoroughly:
Read the full description of those whose qualifications match up with your business. Compare them. If you have difficulty understanding something, contact the employee.

2. Get in Touch with the Shortlisted Freelancer:
Get in touch with everyone on your "suitable employee" list. Tell them your requirement. Among them, select those who seem to be able to complete your deal.

3. Post a Buyer Request:
You can post your deal with an accurate description on the site. Those who understand your deal well or think themselves worthy of the deal, will contact you. This will make it easier for you.

4. Check The Reply of Your Job Post Or "Buyer Request":
For those who are interested in your deal, you can see a sample of their previous work by visiting their profile. And you can hire them by looking at their reviews there.

5. Review their profile meticulously:
Check the work quality rating, Gig Price and feedback of other people who hired them. One thing that's important to note is whether the profile of the freelancer is up to date. It is very important to have a description of their contemporary work.

6. Discuss Everything Clearly:
If you like the profile of any of your employees or sellers, you can get acquainted with them before ordering directly. This will help you establish a rapport with them. Or if you have any other requisition, you can make it clear.

7. Negotiate and Get Your Job Done:
Negotiate with the freelancer about everything that comes to mind—for example, Gig price, your demand and expectations, their demand and expectation, delivery time; etc.

Be clear as to whether your freelancer is giving their price with or without the Fiverr Charge.

After finishing all of this, get them hired. Tell them if you need a custom offer or not. Confirm your order and pay them after they finish the job.

Hiring from Upwork

Upwork is one of the platforms for hiring employees from different countries apart from the borders of one's own country. With this marketplace, you can easily find the right employee for your deal.

Hiring a freelancer at Upwork is a fairly simple task. Nevertheless, it is very important to spend some time in this case.

1. Post Your Job:
First, you can post a description of your deal with a deadline.

2. Wait for the Deadline:
Once the deadline has passed, you will see who is interested in completing your deal.

3. Close Your Deal:
Close the deal after the deadline.

4. Evaluate Interested Freelancers:
Interested employees can be evaluated through their profile and previous work and reviews.

5. Contact and Explain Your Demand:
You can explain your requirements to the selected freelancer by contacting them.

Pay Scale

Payscale refers to the salary structure. This is such a system that determines how much an employee is going to be paid from this workplace or employer as a wage or salary based on different factors,

1. You Can Negotiate Monthly Salary or Weekly or Bi-weekly.
When you take an interview, ensure the proper negotiation. Especially regarding the salary method, find out how your employee wants to receive their salary. Do you agree with their request?

Try to pay them monthly, if they do not agree on monthly payments, then tell them to consider Bi-weekly.

2. Never Pay Upfront
You can pay them after one week of work or two weeks of work- it's up to you, but never pay upfront. A fee paid before the service is performed can be called Upfront payment which can mislead you towards fraud.

In some cases, your staff may need some money to start the project, but asking a customer for more than 15% of the total cost upfront is a red flag for the buyer.

How to Pay Your Employees (Using Paypal)?

How can you pay your employees?

Let me provide you with the simple answer, through the E-payment system. E-payment system is the way of organizing transactions or payment for goods and services via an electronic medium, where you will be free from the use of liquid money or bank checks. This method is referred to as an online payment system or an electronic payment system. Big corporations are doing their transactions through the e-payments system. Even smaller businesses have also entered into the era of e-payment. The e-payment system has grown at a massive rate over the last decade, due to the growing spread of internet-based banking and business as the world advances more with technological progress and development. With the use of E-payment systems and payment processing machines on the rise, that represents an upward trend.

Paypal could be a great E-Payment Solution Tools for you to pay your employees. You do not need to visit the bank. Technology has brought the bank into your home, whether on your private computer or mobile phone. It's so easier now to pay your staff via Paypal.
We are going to discuss how to pay using PayPal.
Follow these simple steps below:

Step 1: First, Open a PayPal Account and then Apply for the Mass Pay Option from your PayPal Account.

Step 2: Choose the PayPal payment method to be switched on.

Step 3: Select the Currency Option for Your PayPal account.
Your Paypal mass pay accounts currency should be the same as your PayPal bank account, with PayPal mass account any transaction can be done in the same currency as your PayPal bank account.

Step 4: Choose the individual kinds of Stuff that you wish to use PayPal for.

PayPal Mass pay is Available in 202 Countries and 25 currencies supported which are given below:

USD, CAD, CHF, CZK AUD, BRL , DKK, EUR, GBP, JPY, MXN, MYR HKD, HUF, ILS, PLN, RUB, SEK, NOK, NZD, PHP, , SGD, THB, TRY, and TWD

According to PayPal the Transfer Charge and the Conversion Charges are:

- Senders have to pay 2.9% + $0.30 per transaction funded by credit card
- Senders do not have to pay anything for transactions funded by bank account
- Receivers pay 2.9% + $0.30 for any transaction
- The conversion rate is undisclosed, but it is more or less often 3 to 3.5% higher than the true mid-market rate in addition to any other fees for sending or receiving.

Use Skype to Communicate with your Employees

Employee Collaboration tools or software like Skype enables the sharing of data and information by providing an online or intranet-based environment for virtual teamwork.

Conversations between employees can be a strenuous job to keep track of, especially as any business grows.

Employees or team members can't collaborate if they cannot communicate with each other. From instant messaging to video conferencing tools (suitable alternative to face-to-face meetings), there are many options for the employee or team collaboration tools, but Skype is better from many angles.

This software will support your business employees who need to correspond with a remote team or want to have a productive meeting with clients, prospective team members, or consultants.
It's very simple to use Skype as your communication tool.

• Download Skype:
Download a suitable version of Skype. If you are a Mac user, download the Mac version. If you are a Windows User, download the Skype for Windows version.

• Set Up Your Skype Account or ID:
Open a Microsoft account and generate a Skype ID. Come up with a user name and a strong password. Do not share this password with anyone.

• Export Your Contacts:
Export Your Contacts from your email or other sources; build a contact list of your staff. To make a contact list click on the Contacts tab which you will find on the left side of your PC screen.

Start Communicating:
Start communicating with your clients or staff after finishing the contact list. Make sure you are connected while you make a call.

• Know What You Can Do with Skype:
On Skype, you can arrange
- -Employee hiring meeting
- -Staff Interview
- -Official and Personal Meeting
- -Project Meeting
- -Feedback Session etc.

Using Skype Smartly to Communicate with Employees

After hiring qualified employees through marketplaces, Skype is an ideal tool for further communication or interviewing between the employees.

In order for a business to be successful, communication between the two parties is very important. Below are ways you can communicate with your employees via Skype:

• First of all, get the contact details of the person you want to contact. If you want, you can make a schedule on Skype, which will help to remind you. Take his or her portfolio; check his or her previous work experiences also.

• If you want to have large business meetings with your employees, you can also use the Bigger Audience feature.

You can make voice calls, chat with your desired freelancer. You can even make face to face video calls if you want.

• You can share your business documents on the Skype screen if needed. In that case, everyone will be able to see it.

• Your employees don't have to work in your office, either. Now you can get your work done from anywhere in the world.

Tools to Manage Your Virtual Employees?

Virtual Employees management tools are the extensive range of technological panacea that help a company manage it's daily Human Resource activities effectively.

HR processes are compliance-driven; and performing them manually is very complex, time-consuming, as well as arduous. Virtual Employees management tools leverage the strength of automation, allowing Human Resource staff to cut costs, save time, and manage the company's human capacity or human power easily.

Fundamental key points to choose Virtual Employees Management tools are,

• Ease of usability

• Multi-channel entrance

• Quick implementation facility

• Customizability to fit unique needs

• Smooth integration facility with third-party tools

• Scalability to accommodate the growth of a business

Virtual Employees Management Tools for example • ADP • Breezy HR • Hubstaff • iCIMS Talent Acquisition • Kissflow HR Cloud • Zoho People • Slack • Youtrack

Time Keeping and Screen Monitoring Tool: Hubstaff

What is Hubstaff? It's a Time Keeping and Screen Monitoring tool or software. This tool or software will keep a record of almost everything on your staff's personal computer. Within every ten minutes, it will take 3 screenshots of your staff's PC and monitor their work activity.
It will share how many times one has moved their computer mouse and their keyboard activity.

This tool will provide you with a productivity update and customizable employee monitoring interface. You can get a clear idea of what your staff is doing exactly. In a simple sentence, it's an intelligence software by which you can control and keep an update on what your employees are doing at their home.

Hubstaff provides you with a 14 day free trial to try it out and after that, you can purchase the plan you require for your business.

Managing Your Employees Via Hubstaff

1. **Time Tracking:** Hubstaff's easy and accurate time tracking system will provide you with the stress-free work monitoring power.
2. **Reporting & Productivity Checking:** It's advanced reporting system will give a compact idea of what your employees are doing while working.
3. **GPS Tracking & Team or Staff's Scheduling:** Its GPS tracking system will provide you with the monitoring power of your staff's fleet-on-the-go with real-time data.
4. **Online Timesheets:** It will work as a sign in and sign out sheet; You do not have to be worried about the timesheet management. The whole system will automatically count the working period.
5. **Easy App Integration System:** You can integrate your apps easily with the interface of this tool.
6. **Payroll Management & Create Easy Invoices:** You can manage your payroll, payment management, and create easy invoices and send them to your clients.
7. **Build a Geofencing:** You can build a job site and set a digital perimeter, as well as you can set up an automatic clock in and out system.

Steps to Set Up Hubstaff

Step 1: Go to the official website and set up your company or organization.

Step 2: Set up your tasks or projects.

Step 3: Configure your organization settings.

Step 4: Invite your staff or team members.

Step 5: Download the suitable version of the Hubstaff app.

Step 6: Try the 14 days trial or Setup the payment rates.

Step 7: Set the user limit and reassign the projects; you are done now you can monitor the screenshots and activities.

Summary

In this section, you have learned:
• Outsourcing refers to the system of getting your job done by someone, who is not your office employee but works for you as a freelancer as per your requirements at an affordable price.
• There are a lot of online marketplaces or Outsourcing sites but compared to others, onlinejobs.ph is cheaper.
• It is easy to hire any professional from an outsourcing site, but one should follow all the procedures and be careful about upfront payment.
• PayPal could be a good solution for paying the salary of your staff.
• There are so many tools that can make your managerial life easier, for example, Skype and Hubstaff.

MODULE 6 QUIZ

Q1. Hubstaff is a __________ tool.
a. Monitoring
b. Communicating
c. Production d. Marketing

Q2. "Your Paypal mass pay accounts currency should be the same as your PayPal bank account" This statement is,
- True
- False

Q3. Which outsourcing platform is competitively cheaper?
a. Fiverr
b. Upwork
c. Freelancer.com
d. Onlinejobs.ph

Q4. What can you do with Skype?
a. Employee hiring meeting
b. Staff Interview
c. Official and Personal Meeting
d. All of the above

Q5. Which one is important when you are going to hire a freelancer?
a. Examine the profile and skills
b. Review of the previous service taker
c. Time management sense and work ethics
d. All of above

Thank you for trusting me with your business. I offer 1:1 Mentorship services at the time of this writing.

Be sure to reach out and take advantage of those services while slots are still available.

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