

ISSUE 13

Compliments of Stacey Shanner

# BUSINESS

## IN ACTION

### CULTIVATING INNOVATION

How it can boost your business

PG. 04



### SEVEN MINUTES TO SUCCESS

Time-management expert  
**Allyson Lewis** tells all

PG. 18

### PRO TIPS FOR BUSINESS TRAVEL

Replace the chaos with calmness

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## Front of Tear Out Card 1



As a business leader, every minute of your time is precious. Follow these tips from time-management expert and author **Allyson Lewis** to start and end your day productively in only seven minutes.





**Stacey Shanner**


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## Back of Tear Out Card 1



**MORNING**

Set yourself up for success by focusing on these five areas at the beginning of each day.

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**01/THINK**  
about possibilities and come up with new ideas.

**02/CLARIFY**  
your “north star”—the driving factors behind what you do.


---

**03/PLAN**  
everything you can feasibly do today, and write it down in a planner.

**04/PRIORITIZE**  
the items on your list by importance, and pick five to do before 11:00 a.m.

---

**05/CHOOSE**  
to commit to your goals for the day or not.



**EVENING**

Reflect on your day by asking yourself these questions.

---

**01/GUT CHECK:**  
*How did you feel today?*

---

**02/TASK EVALUATION:**  
*Did you get everything done that you wanted to?*

---

**03/PERSPECTIVE:**  
*What did you do well today?  
What are you grateful for?*





Dear Bill and Judy,

The road to success is not linear. In fact, it may be one of the bumpiest paths you'll ever take. But as an entrepreneur, you know better than anyone how good it can feel to chase victory. This issue of Business in Action is dedicated to the small actions that lead to big wins. It includes a list of four habits you can adopt today to improve your daily routine, a look at the various stages of growth for small businesses, and an interview with time management expert and author Allyson Lewis.

How is your current routine working for you? If you're struggling to stay on task and get things done. The enclosed guide can help you establish new habits that will prime you for growth.

Speaking of growth, Rome wasn't built in a day, and neither was any good business. However, understanding the growth process can help you level up your company when the time comes. In this issue, you'll find an outline of the five stages of growth most businesses move through on their way to the top.

Allyson Lewis is the founder and CEO of the 7 Minute Life, a guide to improving your life by taking just seven minutes twice a day to prioritize your goals. Inside, Lewis offers advice for how you can utilize her method to maximize your productivity.

What small actions can you take today to focus on yourself and your business? As always, it's a pleasure to send you this magazine.

**Stacey Shanner**



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PRODUCTIVITY

# Adopt a Winning Routine

These simple habits can set you up for success. BY **SHELLEY GOLDSTEIN**

**AS JAMES CLEAR**, author of *Atomic Habits*, says, “Most unproductive or unhealthy behaviors are the result of slow, gradual choices that add up to bad habits.” To help you build a better routine that works for you, try these productivity-boosting tips.

## Start on the right foot

Determine how best to maximize your mornings. If you have the most energy upon waking, schedule high-brainpower tasks early in the day. Or maybe tackle a workout or jot down ideas in a journal so you can prepare yourself for the day with a clear mind.

## Set yourself up for success

Are you someone who gets too tired to do the dishes and clean the living



room before bed and then regrets it the next day? By taking care of these tasks before you go to sleep, your future self will be able to wake up to a tidy space ready for you to make food or start work. You can also lay out clothing the night before or prep your breakfast or lunch.

## Establish working hours

The freedom of being on your own schedule can

## Stay off the apps

Social media is like a siren song, and it can get even louder and more tempting if you use it as a procrastination tactic. Put your phone in another room or lock it for a set amount of time so you can focus on your work.

Don't be too hard on yourself if it takes a while to create routines. After all, research shows that it takes sixty-six days to make a habit become automatic. Be willing to adjust your strategy until it gels into something healthy and productive. ■



**Write down the steps of a daily routine that works for you, and keep the list in a place where you can easily access it to hold yourself accountable.**



# Foster Innovation to Boost Your Business

Companies that continuously work to improve are almost guaranteed to have a competitive advantage over those who don't. BY LAUREN KIM





The marketplace is constantly changing, and any business that doesn't adapt will inevitably falter. To stay ahead of the competition, you need to avoid getting too comfortable with the status quo and instead find novel ways to serve your customers. Use this guide to learn how embracing and enabling innovation can help your company attract and retain consumers, increase brand recognition, and, ultimately, reach each of its goals.

#### → The importance of innovation

Innovation can be the fuel that drives your company to success. Just consider companies like Beyond Meat and Square, which both recognized and capitalized on shifting values and needs among customers. With its meat-alternative products, Beyond Meat disrupted the meat industry by appealing to a growing consumer group of vegetarians and vegans and those who wanted healthier or more ethical options. And Square created, and continues to create, ways for small businesses to easily accept payments with minimal equipment necessary. Similarly, by identifying new ideas and adaptations that can make positive improvements, no matter how small, you can raise your business to the next level.

#### → Set your goals

Before you can create an impactful innovation strategy, you should determine what you want to achieve. Otherwise, you may end up spinning your wheels and wasting valuable resources. Instead, focus your efforts first on changes that will have an immediate impact, such as ones that

solve problems or improve your customer experience. Do you want to broaden your client base, boost your image, or improve customer satisfaction? Pick just one or two goals to start; limiting how many you tackle can help you avoid spreading your resources too thin.

#### → Gather ideas

After setting your goals, brainstorm creative ways to reach them. This can be fun—but also difficult. Fortunately, you can find inspiration almost anywhere. Begin by looking internally to see if any of your products or processes are dated and considering ways to tweak them to improve customer satisfaction. You could also conduct your own market research to determine what your target market wants or needs and ways technology could bolster how you do business. If you're still in need of ideas, consider using suggestion boxes or online polls to solicit ideas from your staff, clients, and vendors. Another option is to evaluate what other companies are doing well and determine whether you can replicate it to enhance your customer experience.

Take  
Action

Pinpoint a challenge your business is facing, and look for an innovative way to solve it.



#### → Start small

If you're a small-business owner, you may have a limited budget for innovating your products and services, but don't worry—even simple, relatively inexpensive ideas can be impactful. Imagine how minor the groundbreaking concepts of adding three-point seat belts to the Volvo in 1959 and putting wheels on a suitcase in 1970 might

have seemed at first. Once you've pinpointed an idea or two to try, nail down vital specifics such as your budget, steps, and timeline and how you'll allocate staff, materials, and other resources.

#### → Be prepared for setbacks

The innovation process has ups and downs, so you may face at least some disappointment along the way.

Rather than grow defeated by any failures, try to learn from them and move on quickly. Your mistakes can provide insights that may propel you closer to reaching your goals.

#### → Test and update

Resist taking your foot off the gas even after you've successfully created a brand-new product or service for your customers. Just as you must always strive to sustain your viability and competitiveness, you'll need to constantly monitor any innovations you've launched and modify them as necessary to maintain their marketability and profitability. Also, you'll likely find something you can alter to help your company run smoother. For instance, after fine-tuning your product offerings, you may want to improve how you communicate their features and your vision to your clients—whether it's through social media or an updated email-marketing program.

While conceiving novel products or ways to run your business may seem like an insurmountable task, you can find success by starting small and slowly building on your accomplishments—you never know what seemingly unassuming modifications may transform your business. ■

# Weather the Storm of Stagnation

Strategic steps, such as improving your relationship marketing to spur consumer engagement and rethinking practices with disappointing returns, can help you surmount unexpected slowdowns and ride the wave to unmitigated growth.

WRITTEN BY: **ANDRE RIOS** / PHOTOGRAPHY BY: **GOLDBARCRM.COM**



## **RARELY IS THE ROAD TO**

success a straight one.

Inaccurate market predictions, broader economic issues, and unexpected periods of seasonality can all cause a dip in business. And when your accounting sheet reports subpar figures as a result, you may be tempted to hit the panic button. However, it may be possible to alter your course instead by taking immediate steps to identify and address difficulties head-on. After all, a bear market isn't your time to hibernate but to attack. Rather than give in to pessimism, try one of the following action plans to prevail in slow periods.

## **Improve your outreach**

For a case study in overcoming professional hardships, refer to Juan Carlos Barreneche, founder of Goldbar, a lucrative real estate agency on the East Coast. "In 2016, my first year in real estate, I sold one house," he says. "In my second year, I hired a coach who told me, 'You're doing the right activity—you're just not doing it consistently enough.' I call it relationship-based marketing. Once I made this more of a consistent action, business blew up."

In the first three years of his real estate career, Barreneche earned a remarkable



JUAN CARLOS BARRENECHE



GOLDBAR TEAM MEMBERS

\$250 million in sales and recruited 1,200 new agents into his downline. He sums up his growth tactic with this tenet: “Learn exactly how to take leads from cold to warm to hot, and provide great service on the back end.” Barreneche recommends three key strategies to propel yourself from stagnation to success.

#### **Lead generation**

Build as many new relationships as you can; Barreneche strongly suggests adding five to ten

new contacts per day to your organization’s CRM. His approach is to talk to virtually anyone he encounters. For instance, he’ll strike up conversations with cold leads at coffee shops, determine who may need an agent, and, even when prospects show little interest, request a referral and catalog their contact information for future engagement.

#### **Lead nurturing**

At this point, ingratiate yourself to your new contacts. “Customers’ memories are short, so stay in touch with them,” Barreneche says. You can do so by sending them items of value, such as blogs and seasonal gifts, hosting client events like happy hours, and keeping them up-to-date on pertinent industry news via email newsletters. Barreneche

“Learn exactly how to take leads from cold to warm to hot, and provide great service on the back end.”  
—JUAN CARLOS BARRENECHE

You may need to adjust some of your core practices to stay competitive and endure trying times. To spark greater consumer interest, consider refreshing your organization with some novel systems.

recommends conducting at least sixteen to eighteen touchpoints per year per contact.

#### **Lead conversion**

Arrange live meetings or send booking links to convert prospects. Be sure to map possible objections ahead of time so you are prepared to overcome them and repeatedly underscore your organization’s value proposition. Barreneche advises acting as a “concierge” to leads, guiding them down the lead funnel until conversion feels like the natural next step. “When prospects feel that you can read their minds and you behave professionally, follow up consistently, and stay in touch with them, there will be little reason to object to you,” he says, “At that point, you have built so much trust and credibility, they will likely want to work with you.”

Barreneche swears by these three steps, assuring that “anyone who implements them can get to six

figures in sales.” Invest time into these fundamental techniques, and you may be better equipped to handle even the most turbulent currents in your industry.

#### **⌚ Re strategize**

What if outreach isn’t the source of your woes? You may need to adjust some of your core practices to stay competitive and endure trying times. To spark greater consumer interest, consider refreshing your organization with some novel systems.

First, determine where you can retool your efforts. If metrics such as client feedback reveal middling interest in certain products or services, identify other methods to entice consumers. Promote price drops, enrich your

online services, increase your inventory of more popular products, or streamline your booking process (another of Barreneche’s favorite strategies). You could also look to successful competitors or hire an advisor for inspiration.

Then brainstorm new initiatives can you roll out to hook fresh clientele. Modify your product line, offer services that target untapped consumers, or adjust how you brand or market goods. And if your marketing strategies aren’t paying off, open social media accounts on popular platforms to attract new leads. (For more details on how to do so, go to page 30.)

It’s important to note that your efforts will go unseen unless you advertise them. Anytime you re strategize, spread the word on social media, via targeted ads, and in email newsletters. Consider this your opportunity to get back in touch with leads and drum up consumer excitement. Ultimately, their engagement is the momentous force that will propel you through difficult times. ■

Take  
Action

If you’re experiencing or anticipating a period of slow revenue, perform metrics to identify the cause. Then adjust your relationship marketing and core practices to improve consumer engagement.



# The Five Stages of Small-Business Growth

Knowing in advance how to navigate the small-business landscape can help entrepreneurs achieve success.

BY SHELLEY GOLDSTEIN





When it comes to aspects like the number of employees, type of management, and kind of products or services they provide, small businesses truly run the gamut. But according to *Harvard Business Review*, there is still a common thread between them: they all go through the same stages of development.

As you begin your entrepreneurial journey, the road ahead might seem uncertain. By understanding the general framework for small-business growth, you can better foresee what you may face in each new chapter and prepare to tackle potential obstacles and challenges you encounter head-on.



### Stage 1: Existence

The launch of any business is exciting yet fragile. Many companies never make it out of this beginning stage due to challenges such as establishing products and services, acquiring customers, and securing enough money to cover the initial costs. For a brand-new business, obstacles like these can often feel too large to overcome if it isn't well-prepared and willing to take chances.

Because finances are limited, the founder often makes up the entire staff, stretching themselves and their skill sets to tackle a host of tasks. They are marketing, sales, product delivery, and customer service

all in one. Planning and forecasting are almost nonexistent since the company is putting all its focus on getting the products or services to the customers while negotiating a very low profit margin.

Investors play a key role by providing seed money, using their reputation to add credibility to fledgling businesses, providing guidance to new entrepreneurs, and even offering to connect them with potential customers, partners, or vendors.



### Stage 2: Survival

At this point, the business has enough customers and sustainable revenue to stand on its own two feet as investor funding wanes. However, profit margins are still minimal in this stage, so you should begin turning your attention toward growth and taking a closer look at your business practices to determine how you can improve your chances of success.

For example, are you marketing to the right audience? Finding and retaining



customers is an important piece of the puzzle for financial stability. Do you have efficient workflows in place? If you've hired staff, they need to have clear roles and responsibilities. Are your products and services making your buyers happy enough for them to leave positive reviews and recommend you to others? Word of mouth can make all the difference in expanding awareness of your brand and earning the trust of prospective customers.



### Stage 3: Success

Reaching this stage means you've established a stable customer base and healthy profit margins, opening up several options for you. Some entrepreneurs choose to go big or go home by investing everything back into the company to push for even more growth. *Harvard*

*Business Review* calls this the success-growth substage.

On the flip side, others are content with enjoying steady profitability, especially if they want to step back from day-to-day operations and give more of the responsibility to managers and other leaders. This substage is referred to as success-disengagement; a company can remain here indefinitely provided it





has the right leadership to navigate and adapt to any changes in the market that may arise.



### Stage 4: Take-off

If you went with option one and navigated it successfully, you would have made big risks that yielded potentially big rewards. Rapid revenue growth is one of the hallmarks of this phase as demand for products and services increases. This is the time to

consider expanding into new geographic markets and offering new products. Operations must be scaled as well, such as by onboarding more employees, putting the right management in place, opting for more sophisticated technology, and implementing workflows that maximize efficiency.

This can be a make-or-break moment for businesses. If you steer the ship with an eye toward smart leadership and adequate cash flow, your business can flourish. If not, you may still have an opportunity to sell at a profit before it sinks.



### Stage 5: Resource maturity

Finally, true sustainability has arrived! At this stage, you'll have the luxury of strategizing more long term, focusing on longevity and dedicating resources to whatever will bolster your business's resiliency. This typically involves pivoting toward refining processes, resolving system and workflow inefficiencies, and managing cash flow.

The challenge in this phase is balancing the structure needed to keep things running smoothly with the entrepreneurial spark that kick-started your business in the first place. To put it another way, be mindful of implementing too many corporate policies that restrict rather than inspire your employees.

From this business-development blueprint, you can more clearly identify what needs and adversities you may face at each stage of growth. Armed with such knowledge, you can better prepare in advance to gain the best shot at realizing your dreams. ■



### Take Action

Use this guide to determine which stage your organization is in, and then create a checklist of steps you can take to ensure you're on the path toward growth.





# SEVEN MINUTES *to success*

Time-management coach, speaker, and author **Allyson Lewis** touts the benefits of intentionally focusing for seven minutes twice per day to be your best self.

BY MATTHEW BRADY





**T**he number seven has always had a unique place in the human experience. We have the seven seas and the seven wonders of the world, and there are rumors of a seven-year itch. Of course, it's also associated with luck. Who wouldn't smile seeing a row of sevens on a casino slot machine?

In business, however, you can't rely on luck alone. You have to be strategic and intentional in everything you do to succeed. To that end, productivity guru Allyson Lewis has taken the concept of lucky number seven and turned it on its head with her 7 Minute Life system, which emphasizes dedicating only a few minutes each day to achieve maximum impact—both in business and in life.

#### Thriving yet lacking

The twentysomething version of Lewis might be



**Productivity guru Allyson Lewis has taken the concept of lucky number seven and turned it on its head with her 7 Minute Life system.**

surprised by this mindset makeover, considering her immediate success. Born and raised in Arkansas, Lewis graduated from William Woods University before breezing through her licensing exams and being hired at a financial services firm at age

“

**With the 7 Minute Life, I'm teaching people to take 1 percent of their time—seven minutes in the morning to do five tasks and seven minutes at night to deconstruct their day—to geometrically improve the other 99 percent of the time they spend living.”**

twenty-one. This led to a prolific thirty-one-year financial career, including twenty-four years at Morgan Stanley. “I ended up in the top 11 percent in sales nationwide at Morgan Stanley in a town of 46,000 with two people on my team,” she shares.

Yet, at forty-three years old, Lewis felt lost. “I just woke up one day and felt in my gut that I wanted more out of life,” she reveals. “I had a great job and family, but there was so much more out there. So I embarked on a quest to understand how I could use my time and talents to experience new things—to thrive like never before. And I wanted to help people and businesses do the same.”

To reach that goal, Lewis created her system, which

aims to encourage people to reach their full potential daily. “We only have twenty-four hours in a day, even though as business owners, we usually think we have way more,” she

explains. “If you break that down, it's 1,440 minutes. With the 7 Minute Life, I'm teaching people to take 1 percent of their time—seven minutes in the morning to do five tasks and seven minutes at night to deconstruct their day—to geometrically improve the other 99 percent of the time they spend living.” In other words, by creating simple, repeatable daily habits, 7 Minute Life practitioners can significantly increase their focus and productivity while also reducing stress.







Practicing what she preaches, Lewis says she has followed her system for years and swears that it has changed her life. Here’s how you can likewise transform your life and your business.

Seven-minute morning routine

1. Think

“People have lost the ability to dream,” Lewis says. “But imagine if you could step out of the noise every morning and ask yourself what you *really* want out of life. So the first thing I teach people to do with their morning seven minutes is to think: dream of possibilities and come up with ideas. It’s all about being intentional with your time and directing your life instead of letting life come to you. In business, that’s going to make your revenue and your company grow.”

2. Clarify

Piggybacking onto that is defining what Lewis calls your “north star”—the driving factors behind what you do. “You need to put into words who you are, what your talents are, and which mindset you need to succeed,” she states. “At the end of the day, when you can confidently say, ‘This is what I want to do,’ ‘These are the lives I want to touch,’ and ‘This is how I want to do it,’ people will be

“We don’t have time to do a thousand things every day, so your plan has to state the really important ones.”

drawn to you and want to take the journey with you, and your business will skyrocket.”

3. Plan

To help gain clarity, you must put a plan in place, which requires the simplest of tools: a planner and a pen. “We don’t have time to do a thousand things every day, so your plan has to state the really important ones,” Lewis says. “We ask you to brainstorm everything you could feasibly do and write those tasks down in a planner. This allows you to reflect, stay tethered to your purpose, maximize your time, and accomplish more.”

What type of planner should you get? It can be a simple notepad, or you can use the 7 Minute Life daily planner, a comprehensive tool that comes with not only tracking pages but also helpful lists and encouraging words.

4. Prioritize

Next, rank the items on your to-do list in order of importance, and then select the five you’ll complete before 11:00 a.m. “We call that our 5 before 11 list,” Lewis explains. “If you focus on doing five important things for the next seven days, a week from now you will have accomplished thirty-five high-value tasks and ninety days from now 450 tasks. Besides moving you toward your goals, engaging in this process means you’re taking care of yourself and doing things that matter, which makes life more meaningful.”

5. Choose

You now have a plan of action and a vision of what the day could be like. But it’s all for naught without your final morning task: choosing to do it or not do it. “Many people need to learn how to create these disciplines,” Lewis admits. “A lot are in what we call cow paths. Here in Arkansas, someone may own thousands of acres, but when they go back to their barn, they take the same path



every day: the cow path. People instinctively use such defaults, especially negative ones—waking up late, having no plan or purpose—because they’re familiar. But people *can* decide to create new assumptions and new mindsets through these morning disciplines.

In doing so, they are choosing every day to better their mental health, lives, and happiness.”

Seven-minute evening routine

By instilling the seven-minute morning disciplines, you’ll better

maximize your time management and have more productive and meaningful days—but it doesn’t end there. Every night, you’ll take another seven minutes to contemplate your day and, if need be, tweak your processes. Lewis advocates asking

yourself questions such as the following to gain deeper insights.

Gut check

How did I feel today? Was I mentally strong? If things were bothering me, am I going to let them continue or am I going to take action?





### Task evaluation

Did I do what I said I was going to do? Could I learn anything? What could I do differently?

### Perspective

What am I most grateful for? Did today matter? What did I do really well? Can I envision a tomorrow that's bigger and better than today?

### Age-old wisdom

The secret to all this is actually centuries old. Lewis credits Aristotle's theory of eudaemonic living as an influence for her belief that true happiness necessitates focusing on others, using one's gifts and skills to make the world a better place, and striving toward a higher meaning. "When was the last time you woke up and really *strived* for something?" Lewis asks. "That's what I want people to do. Eudaemonic happiness will lead to your highest human good, especially in the totality of your life. Ultimately, that's why I'm sharing the 7 Minute Life."

In the end, it all comes down to living in the present. "During this journey over the last couple of decades, I've tried to wake up every day and say, 'Today is all I have,'" Lewis says. "That's something anyone can embrace, especially when it comes to time management. Every minute matters. When you see every day as your most valuable currency and recognize it for the resource it is, you're living your best life. If you don't, you'll blink and today will be gone or a decade will have flown by. A mere seven minutes can get people there and make such a difference, bringing meaning to what they do and how they go about it both in and outside of work." ■

For more info, visit [the7minutelife.com](http://the7minutelife.com)



“Eudaemonic happiness will lead to your highest human good, especially in the totality of your life.”

Take  
Action

Dedicate yourself to the 7 Minute Life concepts for a week, and then review how they've improved your day-to-day living.



# How to Create a Winning Marketing Budget

Every business needs a carefully designed marketing plan to achieve its sales goals, increase brand awareness, and build a positive public image. **BY BONNIE JOFFE**

**C**ONTENT CREATION, SOCIAL MEDIA MARKETING, and other initiatives can help you reach and engage your target audience—but only if you have the funds for them. To outline how much money your business can allocate to various marketing materials over a specific period, you'll need to build a detailed marketing budget. Here are the essential steps for getting started.

## → Define your goals

To begin, establish clear objectives for both the short term and long term. If your immediate target is to attract and convert more leads at a quicker pace, you'll need to determine concrete metrics to aim for—perhaps you want to bring one hundred leads a week to your sales funnel and convert 5 percent of them into paying customers within six months to twelve months. Similarly, an overarching goal of extending your reach and building your brand may be too vague, so you should create parameters



for how to achieve them and measure your success. By understanding the required funds and timelines for these goals, you'll be more equipped to craft a well-managed budget.

## → Establish your target audience

Besides your goals, you'll need to identify your core customer base and what motivates them to buy. To gain a comprehensive understanding of who your customers are, consider using a tool like Google Analytics to gather information about their age, gender, income, and geographical location (if your business caters to a specific area). Also, engaging directly with them on social media platforms via comment replies and polls can provide you with valuable insights into their lifestyles and buying behaviors.





### → Identify ideal channels

Given the multitude of available avenues for marketing, you'll need to conduct some research to ensure that the ones you choose are aligned with your target demographic. For instance, Gen Zers are more likely to be active on social media platforms such as Instagram and TikTok, while baby boomers and Gen Xers may be more responsive to Facebook or email marketing campaigns. The decisions you make about how and where to tailor your marketing messages will directly impact your marketing budget.

### → Research your competition

Conducting a competitive market analysis provides valuable insights into who your competition is and what type of marketing they are doing. This information can enable you to optimize your own marketing efforts by revealing missed selling points or market trends in your messaging or call-to-action efforts that need improvement.

### → Calculate your revenue

With all the necessary information gathered, it's time to turn to your finances. To create your marketing budget, you need to assess your current or projected revenue and where it goes to gauge how much money you have to work with. The amount you apportion to your marketing will depend on various factors, including your overarching goals and target market.

However, your business's size and age will also impact this number. For example, the US Small Business Administration recommends dedicating 7 to 8 percent of your gross revenue to marketing if you're below \$5 million in sales and have a net profit margin between 10 to 12 percent, while other experts suggest spending up to 20 percent if your industry is more competitive.

### → Allocate resources

In addition to your general marketing funds, you'll need to determine how much you can designate for each individual activity, which can be challenging. If your efforts are too narrow, you may risk missing potential clients; conversely, casting your net too wide can lead to messaging that will not resonate, ultimately affecting your customer-conversion rate. Review your goals to assess your priorities so you can find a balance through the various marketing channels and appeal to as many potential customers as possible.

### → Create a marketing budget template

To better stay on top of where you're putting your resources, build a template that ranks all your marketing expenditures by category. This will add structure and can also help squelch the chances of overspending and exceeding your monthly, quarterly,

and yearly budgets. Also, set KPIs to measure the results of your marketing initiatives and return on investment. The impact of these efforts will allow you to adjust your budget and strategies as needed.

Successful marketing is the catalyst for enticing new customers and fostering loyalty from existing ones. Developing a budget will help ensure you have the financial resources, no matter how limited, to maximize this business tool and reach even greater heights. ■

**Take  
Action**

**Set clear marketing goals and allocate your money accordingly to get the most out of your marketing investments.**



# Building Your Social Media Presence

Social media wields significant influence over consumer behavior and purchasing decisions, making it important that you bolster your brand's digital presence to harness the full potential of this valuable marketing tool.

BY ALLISON GOMES





## IN TODAY'S DIGITALLY CONNECTED

world, having an online presence has shifted from being a choice for businesses to an absolute necessity. Social media platforms provide a powerful way for entrepreneurs and business owners to connect with their audiences, showcase their products or services, and build a distinct brand identity. However, mastering social media requires more than just posting occasionally—it takes a strategic approach and a staunch commitment to growing your online visibility.

### > Why it matters

In 2022, there were over 4.5 billion social media users globally, with the average user reportedly spending two and a half hours scrolling each day. Given the considerable amount of time people devote to their online activities, it's fair to assume that what they encounter on social media significantly influences various facets of their lives, including their entertainment preferences, travel choices, and, unsurprisingly, support for businesses. Users often rely on posts from others to inform their purchasing decisions, looking at what those people are saying and how they feel about a certain product or service before buying anything.

Further, in a digital landscape where a typical user engages with over six social



media platforms, such as Instagram, X, LinkedIn, TikTok, and Facebook, the probability of your business capturing the attention of potential consumers is significantly elevated. Should a video of yours go viral, it would not only broaden your reach within your target audience but also enhance your chances for increased sales, heightened brand recognition, and overall growth.

### > Define your goals and audience

Before diving into social media, it's important to first clarify your objectives. Are you aiming to increase brand awareness, drive website traffic, boost sales, or provide customer support? After your goals are set, you can identify your target audience. Without understanding who you're trying to connect with, you can't post content that resonates with the demographics,

interests, and online behavior of these potential consumers.

Knowing your goals and audience will also help you decide where to post your content; after all, not all social media platforms are created equal. Different platforms cater to diverse audiences and content types, so you'll want to focus your efforts on the ones most relevant to your business and objectives. For instance, TikTok is most popular with younger generations and Facebook with older ones. Consider your brand's voice and your overall goals, then select the platforms that align with them.

### > Don't undervalue quality and consistency

Once you know where and to whom you're posting, focus on creating and maintaining consistent branding

across all your social media profiles. For starters, use the same profile picture, cover photo, and bio information on each of your accounts to ensure instant brand recognition. Extend this cohesiveness to your content style, colors, and tone, all of which will help to establish a singular brand identity that your audience can better connect to.

Additionally, it's essential that you post to each of your accounts regularly. By doing so, you can better keep your audience engaged with your brand. A simple way to stay on top of your profiles is to develop a content calendar that outlines when and what you'll post each day, week, and month. You can also make use of scheduling tools to automate posts, ensuring a steady stream of content even during busy periods.

Just as important as consistency, though, is quality. Share valuable, relevant, and engaging content in various formats, such as images, videos, and infographics, to keep your audience interested in what you have to offer. This could include a video showing what your employees do in a day or a series of text-based posts that discuss recent data relevant to your field. Just remember that different types of content

**In 2022, there were over 4.5 billion social media users globally, with the average user reportedly spending two and a half hours scrolling each day.**





perform best on certain platforms. You can't simply post a TikTok video to your LinkedIn and expect success; you'll want to tailor your content to your chosen platforms to maximize the return you get from it.

Whatever you or your team does post, don't merely upload and walk away. Social media is a two-way street, so promptly respond to comments, messages, and mentions. Such interaction humanizes your brand and shows that you care about more than just sales, which in turn can help foster greater engagement with potential customers and build trust between them and your brand.

#### > Monitor your success

Most social media platforms offer analytic tools that provide insights into your success, making it easy to track metrics like engagement rate, reach, clicks, and conversions to help you better understand how your content is performing. By analyzing these data points, you can refine your strategy and tailor your content to what resonates best with your target audience.

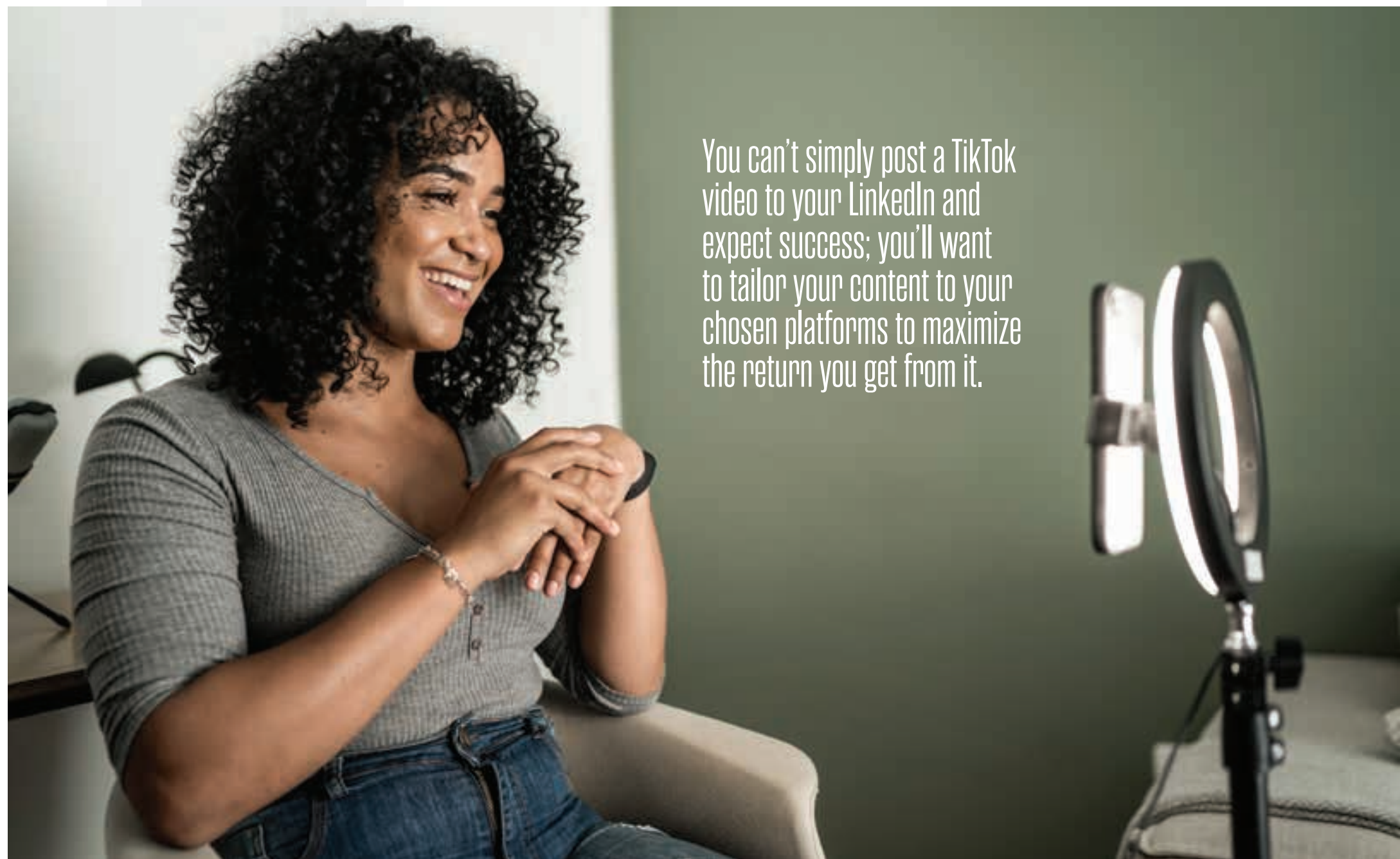
However, don't get too caught up in the data and become afraid

of failing. Because the online landscape is constantly evolving, a lot of social media is about experimenting with new features, posting times, formatting, and trends. You may find that a certain type of post resonates more with your target audience than you realized or that something that worked last month is no longer generating interest. And if you try something and it doesn't end up working for your business, that's OK—you can always try again.

Building a strong social media presence is a multifaceted endeavor that requires strategy, consistency, and engagement. But once you gain a deeper understanding of your objectives and target audience, you can curate content that boosts visibility, brand recognition, and, ultimately, sales. ■

#### Take Action

**Examine the current success of your social media profiles to determine how you can be more consistent, authentic, and engaging with your audience.**



You can't simply post a TikTok video to your LinkedIn and expect success; you'll want to tailor your content to your chosen platforms to maximize the return you get from it.





# Pro Tips for Business Travel

Discover what to do before and during a corporate trek to better your chances for success and enjoyment.

BY MATTHEW BRADY





## HITTING THE ROAD—OR, MORE LIKELY, THE SKIES—FOR BUSINESS HAS

its perks for the professional traveler, such as experiencing different cities and cultures, expanding their sphere, and meeting people face-to-face. The trip itself, on the other hand, isn't always quite so ideal.

However, it doesn't have to be that way. With proper preparation, you can minimize any stress and inconvenience and enjoy your experience to its fullest.

### Packing

The axiom “time is money” certainly applies to business travel considering how much of it is often frittered away, especially in interminable airport lines. Packing smartly can be your first line of defense against this. If you bring only a carry-on for a short trip, you can save time checking in and retrieving luggage.

In addition, be sure to collect all essential information well ahead of time, including a list of your travel times, transportation details at your destination, and an itemized itinerary of

the business at hand. Also consider downloading the apps for your hotel, the event location, and anything else relevant to your business so pertinent info is always at your fingertips. Speaking of tech, don't make the ultimate rookie mistake of forgetting chargers for your phone and laptop, and confirm that someone in your IT department will be available if you encounter any tech glitches.

### Boarding

It's usually recommended that you arrive at the airport at least two hours before

your flight's departure, but there are ways to make the boarding process smooth even if you can't. For example, you can often check in online and get your boarding pass ahead of time. Plus, if you enroll in the government's TSA PreCheck program, you can cut down your wait time at airport security points (to typically ten minutes or less). For international business travel, signing up for Global Entry can similarly expedite your return into the country—just keep in mind that the application process takes several months. Whatever you

*Don't make the ultimate rookie mistake of forgetting chargers for your phone and laptop, and confirm that someone in your IT department will be available if you encounter any tech glitches.*



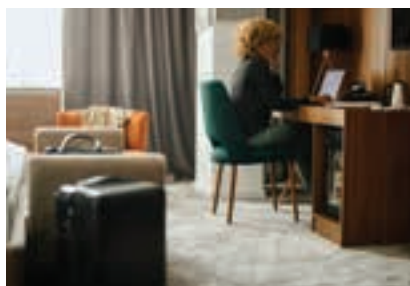
do, always make sure to keep tabs on your flight before you leave home in case of delays, changes, or cancellations.

### Comfort and convenience

A key chunk of planning should go toward making your corporate trip stress-free. Consider your biggest pet peeves, then identify possible solutions. Noise-canceling headphones, for instance, can eliminate the surrounding chaos in airports and on flights and allow you to rest or stay on track with work. (Just don't get so focused that you miss any important announcements.)

In addition, many airports offer business lounges as a convenience for customers; an app like LoungeBuddy will show you which are available and where you can find them, enabling you to secure your own little piece of solitary heaven. You may also want to consider downloading an expense-management app like Expensify to make the process of collecting receipts for reimbursement simple. In the





busyness of travel, it can be easy to forget about or even lose them.

You might want to bring the most basic comforts of home along with you as well: namely, cozy shoes and your own pillow. If you're flying to a destination but stopping at your hotel before the event, wearing casual shoes during the trip can be a lifesaver; as a bonus, it can make going through security easier. (Going right from the airport to the event? Keep dress shoes in your ever-reliable carry-on.) And since you need to be well rested for your business plans, having a pillow you know you'll sleep comfortably on



Many airports offer business lounges as a convenience for customers; an app like LoungeBuddy will show you which are available and where you can find them, enabling you to secure your own little piece of solitary heaven.

at night can prevent any sleep-deprived disasters.

#### "You" time

Once you arrive at your destination, you will likely be gung ho to dive into business mode. But, if possible, make sure your trip isn't all work and no play—after all, the travel itself isn't the only thing that can add stress to a business trip.

Peruse your itinerary beforehand, and pencil in opportunities to see the city, even if it's just walking through a nearby district, reading a book at a park, or eating at a local haunt. (And take care to pack comfortable clothes for such adventures.) In terms of activity, identify ways to get moving while off the clock, whether it's going on that aforementioned

walk around town, taking a dip in the hotel pool, or hitting the hotel's treadmills. Maintaining an exercise routine can keep your mind sharp and help you feel energized during your time away.

Don't take a one-size-fits-all approach to business travel. Every trip you take will likely be different, both in scope and duration, so plan according to the time you have and the destination to which you're traveling to make the most of your experience. ■

#### **Take Action**

**Start making your business travel checklist now for your next trip, and keep it handy so you can add items to it as you think of them.**





# Close Sales like a Champion

Develop the six qualities that equip top closers to overcome industry challenges and land more deals.

BY LUKE ACREE





In the twenty years since ReminderMedia opened its doors, our team has onboarded and coached over a thousand sales professionals. Many have been absolutely stellar salespeople—the kind who consistently lead shout-out boards and blow through their monthly quotas. But what makes these talented individuals so capable of navigating any sales situation with the same ease of holding a simple, natural conversation? Why do they seem born to sell?

All top closers possess six key qualities that separate them from their peers. If you're a sales professional eager to polish your skills, foster each one to enhance every client interaction and virtually guarantee more successful sales.

#### » Confidence

One of the most impactful skills in a salesperson's arsenal is confidence. Confident people don't just believe in themselves—they inspire others to believe in them too. After all, your role is to earn prospects' trust that your organization sells the best accounting software or can secure the best rates on life insurance. Project confidence, and you'll consistently assure leads that they are in good hands.

Self-confidence may seem like something you're born with, but it's not; it's a muscle you can work until you see results. I've found that facing my fears has been a tremendous way to do this. Are you nervous about promoting your product at a conference or trade show in front of a large audience? Are you hesitant to strike up networking conversations with strangers? Challenge yourself to take these risks, and retry them if you fail. When you make a habit of overcoming fear, your confidence will grow.

#### » Focus

You can't find success as a seller without knowing that in each interaction with a lead, even your first greeting, your final goal is always the close. That means the purpose behind every bit of



conversation, every touchpoint, and every visual aid or demonstration is to guide a customer from the front door to the cash register, either literally or figuratively.

If you want to stay motivated and focused on this goal, try to establish your “why”—what inspires you to get up each morning and work hard to succeed. It could be your family life, some long-term financial plan, or

even the rush of hustling to close deals and gain recognition on those leaderboards. When you know what's fueling you to pick up the phone every day and call leads, you can enter each client interaction with the laser focus to close deals and propel yourself to succeed.

#### » Persuasiveness

This is the keen ability to change people's minds. Some leads may

approach you because they saw an advertisement for your product and are confident that it's right for them. In these instances, your role is to offer excellent customer service as they convert and maybe even convince them to upgrade their purchase. But in other cases, you may be dealing with a customer who has serious objections. Maybe they're on a tight budget, think your product is a poor fit for them, or haven't heard





of your company at all. As a result, they might not feel the urgency to act anytime soon, especially if they don't have a reason to trust you yet. A persuasive salesperson can guide a lead past any objections and ultimately close those deals.

So what does persuasive speech look like? Successful closers use active, engaging language and storytelling to mine the *emotion* behind a product or service. Take real estate, for example. People don't just want to buy a house; they want to buy the lifestyle a house can provide them. Persuasive sellers know how to connect with leads on a deeper level, appeal to their emotional demands, and ultimately

convince them they offer the solution they've been needing.

#### » Preparedness

Do you think you've seen everything a customer could throw at you? Think again. There are more unique objections, refusals, and rebuttals than you could ever dream of. However, if you stay prepared, you can pitch yourself to prospects with confidence and ease.

Every time you communicate with a lead, keep your sales playbook handy. Pull it up when working at your computer, and save a copy on your smartphone for when you converse with prospects outside the office.



This resource can be a lifesaver when leads have specific questions about pricing, your company's history, or your success rates.

However, you should also be able to recite key details about your company and what you sell off the top of your head to ensure a more natural discussion. And, just as importantly, you'll need to get comfortable going off script to adapt to shifts in the conversation. When you enter a sale prepared for anything, you can confidently offer the value proposition behind your product, address objections, and then request the close.

#### » Attentiveness

On my sales-and-marketing podcast, *Stay Paid*, I spoke with ultrasuccessful insurance broker David Price, who rakes in millions of dollars in deals every single year. Price said that when he builds up his sales team, he seeks agents who "are coachable, have a positive attitude, and have grit." In other words, he needs salespeople who *pay attention*. Good salespeople are eager to learn from more-experienced peers and have the right attitude to continuously improve their own techniques. They reflect on what works and what doesn't and adjust their closing tactics in pursuit of perfection.



**Great closers listen to leads carefully, make the effort to understand their needs, and then tailor their pitch to offer specific solutions to their demands.**

Attentiveness is an even more valuable trait when holding one-on-one conversations with prospects. Great closers listen to leads carefully, make the effort to understand their needs, and then tailor their pitch to offer specific solutions to their

demands. To exude attentiveness, use a prospect's name when you speak to them, be courteous, and adjust to their communication style. And when you're face-to-face, look them in the eye and smile at them. Doing so establishes a





## Objections may seem like a salesperson's worst adversaries, but skilled closers know how to anticipate them and handle them effectively.

rapport and builds trust so they feel comfortable saying yes to you.

### » Persistence

Objections may seem like a salesperson's worst adversaries, but skilled closers know how to anticipate them and handle them effectively. They're able to address a prospect's concerns without being offensive, pushy, or aggressive and can also take a "no" to the chin without giving up. A lead may refuse their services now, but what about tomorrow? What about the third, fourth, or fifth time they reach out? Fortune is in the follow-up—the most successful closers are the ones who continue to cultivate relationships with leads until they eventually agree to a deal.

What if you face outright refusal and a prospect denies any future contact? Don't take it to heart. Even when a lead "dies," strong closers stay persistent. They stop, take a breath, and pick up the phone again—because the next client might say yes.

### » Experience

When it comes down to it, frequency is what truly creates greatness. A salesperson can start their career thinking they're the Michael Jordan of sales, but raw talent can only get them so far. In business, just about every skill, from accurate bookkeeping to attractive advertising, requires practice. The top dogs in sales have years of it under their belts, taking the other traits and refining them into proven selling

techniques that almost no one could say no to.

There's no secret sauce here—the only way to gain experience is to position yourself in front of prospects as often as possible. As you continue to practice and refine the art of closing sales, you can develop every characteristic on this list and see a quantifiable uptick in your closing rates. ■



#### About the author:

Luke Acree is an authority on leadership, a lead-generation specialist, and a referral expert who has helped more than 100,000 entrepreneurs and small businesses grow their companies. He hosts *Stay Paid*, a sales and marketing podcast, and has been featured in *Entrepreneur*, *Forbes*, and *Foundr.com*.

#### Take Action

Cultivate these six qualities in your sales to convert more prospect interactions into closed deals.

# recommendations & referrals

are the core of my business and always greatly appreciated.  
*Thank you for your continued support!*




#### Stacey Shanner

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## Front of Tear Out Card 2



# CLOSE DEALS LIKE A CHAMPION

All top salespeople possess the same **six qualities** that drive them to success. If you want to close more deals, practice honing your abilities in these categories.






**Stacey Shanner**

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## Back of Tear Out Card 2

**1 Confidence**  
Challenge yourself to take risks, and don't be afraid to try again if you fail. Make a habit of overcoming fear, and your confidence will grow.

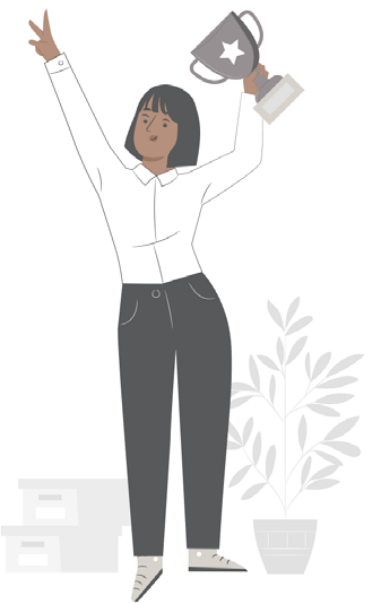
**2 Focus**  
Establish your "why"—what inspires you to get up each morning and work hard to succeed. When you know what's fueling you every day, you can enter each client interaction with the laser focus to close deals and propel yourself to succeed.

**3 Persuasiveness**  
This is the keen ability to change people's minds. A persuasive salesperson can guide a lead past any objections and ultimately close the deal.

**4 Preparedness**  
Every time you communicate with a lead, keep your sales playbook handy. This resource can be a lifesaver.

**5 Attentiveness**  
Great closers listen to leads carefully, make the effort to understand their needs, and then tailor their pitch to offer specific solutions to their pain points.

**6 Persistence**  
Fortune is in the follow-up. The most successful closers are the ones who continue to cultivate relationships with leads until they eventually agree to a deal.





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★★★★★  
*The Smith Family*  
Philadelphia

Stacey is the best of the best! Our family was very pleased with her services, especially Snowball, our little pup! She listened to all of our concerns, wants, needs, and dreams. Stacey is totally awesome! I will be sharing her information with everyone that I know.



★★★★★  
*The Miller Family*  
Manayunk

Stacey was very patient with us, even though we were very picky. She knew how important it was for us to have a great experience and great service. We would definitely refer Stacey to all of our friends and family.



★★★★★  
*The Austin Family*  
Manayunk

Stacey is truly a very impressive person. She works fast, efficiently, and effectively. Her services are top of the line and we were very satisfied with her work. We love Stacey!



*Stacey Shanner*

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