

flackery

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Here's a quick video with all the answers...

Editor's Note

"What lies behind you and what lies in front of you compares in comparison to what lies inside of you." -- Ralph Waldo Emerson

It's the time of year where I recommend taking a deep look at all you've achieved this year.

To me, September is the start of a new year, so I'm in review and refresh mode in regard to my business.

With annual goals in front of me, I assess achievements and work in progress. I consider how the world has changed in the same amount of time.

AI's impact to many industries was a hum a year ago and shouted through a megaphone several months since. Twitter is now X. Threads was "the" new platform a couple months back...for about five minutes.

Outside influences (technology) like those need to be considered as you look at your goals. Here are questions to consider.

How did/have you adjusted to just those things mentioned above? Which impacted your business the most? How have you changed your business model since Jan 1?

Why did you miss a target? What made overachieving in one area possible?

How have your business relationship building efforts gone this year? Are you back to a steady mix of in-person and virtual events? Or are you still mostly virtual? Is that a positive or negative for your bottom line?

So many questions to ask yourself as you take time to review how far you've come this year. There's no wrong answer, however if results aren't where you want them to be, it's up to you to fix your trajectory and realign your strategy!

Now is the time to make a reboot if necessary, to end the year with the success you imagined back in January! I know you can make it happen!

Lisa J. Jackson

Editor of Flackery

Co-Founder of The Business Guild LLC

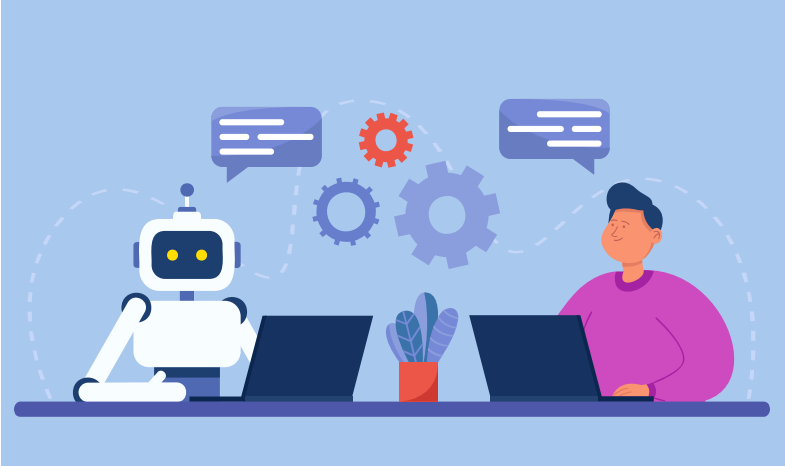
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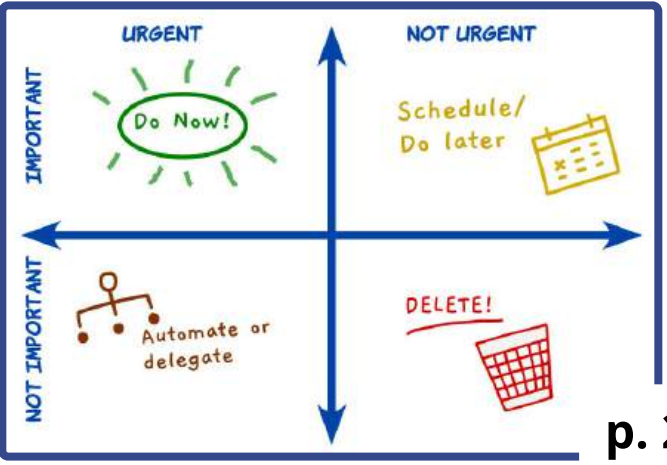
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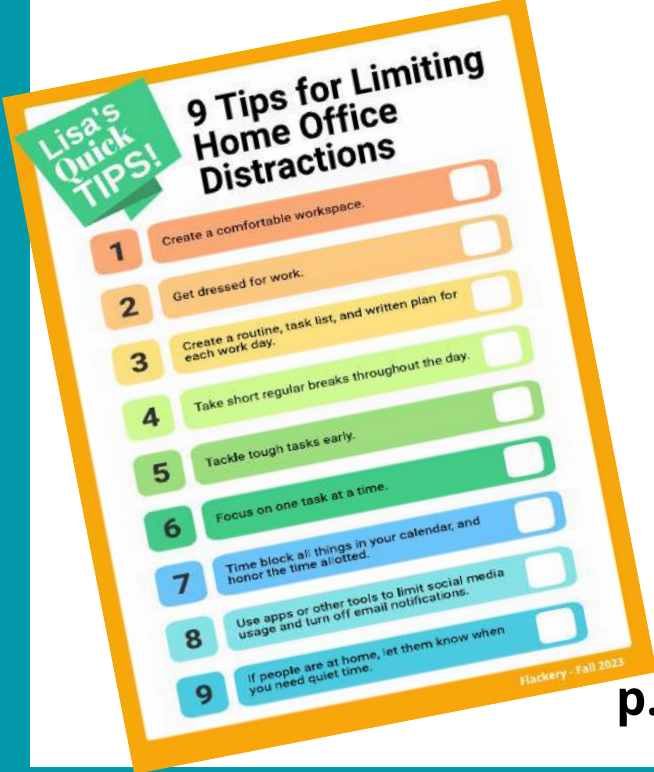


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Book Review

**How to Talk to Anyone About Anything:
Improve Your Social Skills, Master Small Talk,
Connect Effortlessly, and Make Real Friends**

By LISA J. JACKSON, The Business Guild

Author:	James W. Williams
ASIN:	B08ZW85PPX
ISBN:	979-8727982488
Price:	\$4.97 Kindle; varied prices for paperback
Where to buy:	any online outlet

Even though I've been networking for years, including running in-person events, I still occasionally have a bit of awkwardness when it comes to starting conversations with people I'm just meeting.

I've found *How to Talk to Anyone About Anything* by James W. Williams a good resource when I need a little confidence booster and some reminders on social interactions.

This book is an easy, enjoyable, relatable read by offering straightforward advice for those of us who can be a bit shy, as well as those who have social anxiety.

Williams presents practical tips on how to engage with anyone about any topic, using storytelling as an effective communication and connection tool.

It encourages asking open-ended, appropriate questions that enable conversations instead of short replies. Being honestly curious about learning about the other person can go a long way to building a relationship with the person -- professionally or personally.

And it talks about the importance of listening -- there is power in actively listening and allowing the other person to speak. Think of when someone asks you a question and how you appreciate it when you see them listening to you and being curious about what you are going to say next. It feels good, right? Listening goes a long way to learning to talk to anyone, as strange as that might sound.

Of course, improving confidence in any area all comes down to the personal effort you are willing to put in, but suggestions in this book are worthy of trying if you want to push through some social anxiety.

If you're struggling with personal communication -- in person or through an online platform, this book is worth a read.





By Pat Hammond, The Business Guild

It's official. You quit your day job and launched your business. Now comes the big challenge. How do you find clients?

It's a question we hear a lot in our networking groups, but it's usually asked quietly, one-on-one, rather than in front of the group.

I'm not sure why.

It's a reasonable question.

Where do people find clients?

The short answer is: It depends.

Everybody talks about digital marketing and social media like they're the secret sauce for automatic success.

Those are great tools if you have the time and money to invest in them, but what can you do right now? Especially when you're just starting out.

I've put together a quick list of easy, budget-friendly tactics for consultants and service providers. Each of these activities are tried-and-true methods that either I or people I know have used to find clients.

7 Proven Tips for Finding Clients (It's Easier than You Think!)

1. Start by identifying who your ideal client is and where they hang out

Create a customer profile based on your ideal client's demographics. (age, ethnicity, education, location, marital status, and income). Don't forget to include their common problems, habits, hobbies, favorite social media platform, and values.

The more information you have, the easier it will be to identify the best place to find them and connect.

It's okay to have multiple ideal clients as long as you create separate customer avatars for each of them.

2. Think local

Why spend a lot of money competing on a national stage when you can connect with people in your own backyard?

Consulting is a personal service. You're selling your knowledge, your experience, and your personality. The best way to build a reputation and make those first sales is to connect with people in the real world.

- Join local business and networking

groups.

- Attend events where your clients are likely to be.
- Be active in regional online social media groups.
- Show your expertise by volunteering to be the guest presenter for local industry groups.

3. Mine your existing network

Believe it or not, you've been networking your entire life.

Mine your network by talking to former employers, co-workers, and people you already know.

Ask five people in your network to introduce you to people in their network.

Be specific in your request.

If there is a particular person you want to meet, ask for an introduction. Otherwise, ask to be connected to people who are suitable candidates for your service or conduits of potential clients.

4. Get friendly with your competitors

Competitors don't have to be enemies. For

many people, competitors are an excellent source of leads and referrals.

They also present an opportunity to work together to bid on bigger projects and reach new markets.

My experience has been that people will refer clients when they're not a good fit for their own business. Just remember that it goes both ways. If they're sending you customers who are too small for them, be sure to reciprocate by sending them customers who are too large for you.

5. Try local ads on Facebook, Patch, Craigslist

Don't be afraid to spend a little money on local ads on [Facebook](#), [Patch](#), and [Craigslist](#). They're not a good fit for everyone, but these types of outlets are affordable and make it easy to target specific geolocations and audiences.

6. Get listed on industry or directory websites

Sites like [thumbtack.com](#) are great for people who provide a physical service. Not only do they take care of the marketing,

Campaign Title

Subtitle

Prepared for:

Prepared by:

Date:

Vers:

Prospecting	Preparation		Presentation
Identify the customer	Identify customer's pain point	How do you solve their problem?	Demonstrate Value
Connect with the customer	How is your solution different/better?		Overcome Objections
Closing Ask for the sale	Follow Up Build long-term relationship	Ask for referrals	

Sales Planner Canvas

©The Business Guild 2021

Organize your sales process with our Sales Planner Canvas.

but they qualify leads and direct customers right to your listing. The same goes for industry directories from professional groups.

Many potential customers look to these organizations as a place to find a local professional. Take advantage of your membership dues and make sure you have a current profile that includes your areas of expertise and contact information.

7. Direct mail. (Yes, I'm serious)

This one may seem old school, but direct mail is an excellent way to connect with potential customers.

Postcards are both cheap to buy and mail. — [Staples](#) has an excellent, affordable

print shop.

It is okay to use a stock template, just make sure the visual message is memorable or entertaining for people to remember you when they need your service.

The beauty of this is that you don't need to send hundreds or thousands of postcards. Start small and put together a list of ten or twenty people you'd like to talk to and send them a postcard every 6 - 8 weeks. — The current postage rate is 48 cents, so you're looking at a cost of \$5 -\$10 plus the postcard.

These classic techniques may not be as sexy as social media and digital marketing, but they are simple, affordable, and well within the reach of the average small business owner.

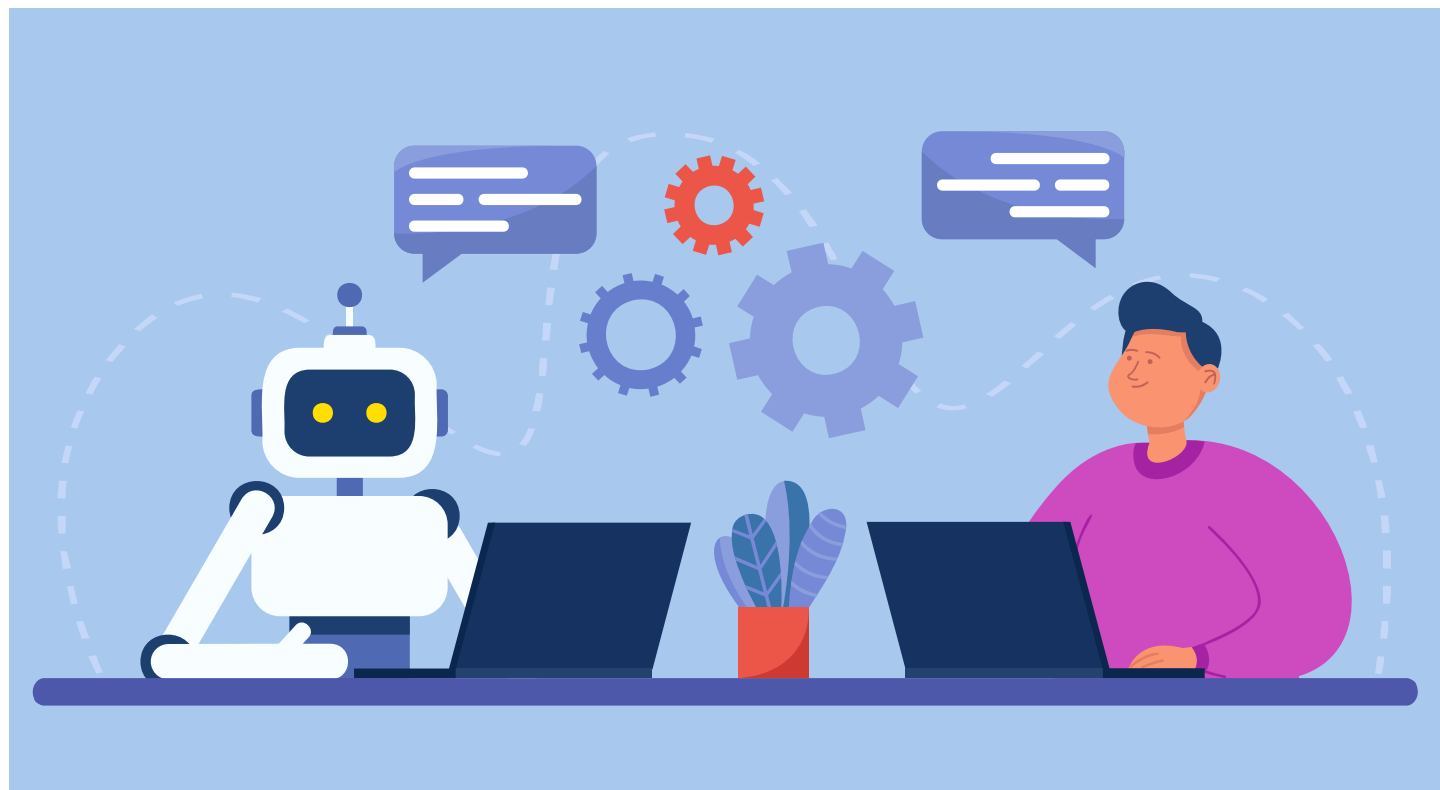
All you need to do is choose 2 or 3 methods that work for your business, and use The Business Guild's [sales planner canvas](#) to create a repeatable sales process.

Finally, don't forget to use a CRM or spreadsheet to track your efforts and results. ✓

Need help with your lead generation & sales processes?



Check out *How to Overcome CRM Overwhelm: a Conversation with Veronica Hugh*



Future-Proof Your Business: How to Avoid Being Replaced by AI

By Pat Hammond, The Business Guild

A few months ago, I realized artificial intelligence (AI) had become so advanced that it could now provide almost all the services I offer.

And it was easy.

All the user had to do was answer a few quick questions and technology did the rest.

- Semi-custom websites, including SEO optimization and key word content
- Press releases and ad copy

- News and business articles

AI can do all my jobs for free in less than three minutes.

I was stunned.

How was I supposed to compete with that?

Once the shock wore off, I did what any reporter would do. I went out and started looking for answers.

My first stops were [ChatGPT](#) and [bard.google.com](#).

Do you need to worry about losing work to artificial intelligence?

I asked both sources what to do when your job is replaced by AI.

The answers were eerily similar.

- Upskill and retrain
- Pivot to a new career
- Start your own business

They also suggested doing more networking and being more ‘flexible and positive.’

It was unimpressive advice from a pair of systems that are quietly taking over the work world.

That’s when I had my aha moment.

This is not the first, nor will it be the last, time in human history that new technology has disrupted the status quo.

Remember when people didn’t think home computers would become a thing? How about cell

phones?

Can you remember when computers took up thousands of square feet in a building? Now we can carry computers in our pockets!

People adapt to using technology to evolve their work – and play.

Artificial intelligence is no different.

With that in mind, let’s break it down to answer journalism’s core questions — who, what, where, when, why, how.

1. Who is affected by artificial intelligence?

That answer is simple.

We’re all affected.

Artificial intelligence is already part of our everyday world.

Rather than wondering who AI impacts, ask how

and when it will disrupt your business or industry and how you can profit from it.

Accounting is a great example of this.

Forty years ago, people did accounting by hand. Instead of replacing accountants, accounting software made their job easier. It improved their efficiency — a very important trait for an accountant — and opened the door to taking on more clients.

The software also created opportunities for people to expand their services.

For example, many bookkeepers and accountants now offer training and account set-up services to help people who want to use technology to DIY their books.

2. What can I do to avoid being replaced by AI?

Change happens. You can't stop the wheel from turning, but you can take steps to ensure your relevance.

Be proactive. Think about how AI can help you improve your offering.

Choose a niche, or micro niche, and become a subject matter expert.

As Steve Martin once said, "Be so good they can't ignore you."

Learn theory to get a better understanding of your industry and how people use your services.

Take a class or get to know people in other industries. Find out where they need help. Use that information to develop highly specialized products and services.

Don't forget that just because technology can do some tasks, it doesn't mean it does them well.

Consider the possibilities & dream big.

While technology excels at processing data and repetitive tasks, it fails with human skills, like personal interaction, empathy, and creativity.

Embrace the technology as another tool in your toolbox.

Consider it a partner instead of fearing it as a replacement.

3. When do you need to think about this... and where do you start?

You're already behind the curve if you haven't started to think about AI and how it affects your business.

You don't need a crystal ball to realize that any activity that is repetitious is a prime candidate to be replaced by technology.

Artificial intelligence is good at things that are

linear. While it can build a modern website in less than three minutes, it isn't able to replicate the complexities of critical thinking and creativity. It can quickly research and extrapolate what it finds, but misses the nuances.

Critical thinking and creativity are your advantages.

Take stock of which areas AI excels and fails, and find the spaces in between.

Look for places where you can exploit technology to your advantage.

4. Why should you embrace AI as part of your solution?

Artificial intelligence is no different from any other tool.

While many people focus on the possibility of losing jobs, the fact is that AI is

opening many more opportunities.

Think about it.

How much more time would you have to pursue other interests if AI took over some of those tedious, repetitive tasks?

How many new clients could you take on?

How much money would you save if you didn't have to hire someone to do the things you're not good at?

Consider the possibilities and don't be afraid to think outside the box.

5. How do you leverage artificial intelligence to stay relevant?

Micro-business owners are busy people. Even if you have a small staff, there are only so many hours in the day, and you're probably using all of them.

The best way to leverage the power of AI is to hand off tasks that do not

require your personal attention.

Start by automating anything that is automatable. Email campaigns, data analytics, and chatbots are top choices, but anything that is repetitive or outside your skill set is fair game.

You can also use AI for specific tasks like sales and marketing, lead scoring, sales forecasting. It can also help with researching and writing sales pitches and marketing copy. — Don't forget that AI's strengths lie with data, not creativity.

While it can find the perfect keywords, you'll have to review marketing copy for quality and content.

Finally, embrace your

humanity.

It's been said that technology has stripped our ability to interact with other people.

Use your innate empathy to improve user experience. Be the person people want to do business with.

All it takes is a willingness to make the effort.

We live in a time when technology makes almost anything possible. Instead of lamenting the loss, I challenge you to consider the possibilities. ✓





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Lisa's Quick TIPS!

9 Tips for Limiting Home Office Distractions

1

Create a comfortable workspace.

☐

2

Get dressed for work.

☐

3

Create a routine, task list, and written plan for each work day.

☐

4

Take short regular breaks throughout the day.

☐

5

Tackle tough tasks early.

☐

6

Focus on one task at a time.

☐

7

Time block all things in your calendar, and honor the time allotted.

☐

8

Use apps or other tools to limit social media usage and turn off email notifications.

☐

9

If people are at home, let them know when you need quiet time.

☐



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Flackery - Fall 2023

"When we nurture a positive inner narrative, we bolster our self-confidence, resilience, and motivation." -- Alexander Anderson-Kahl

emotional one based on ego. "We don't like to fail, we don't like to fall down. We're so afraid of embarrassment and shame that we become perfectionists."

She adds that some negative talk is helpful. — Be on time, wear deodorant, be ready. But when it becomes an obsession, it can become a problem.

Why do we accept negative self-talk from ourselves when we know it's skewed?

Have you ever met someone who struggles with impostor syndrome? They could have amazing credentials — the right education, skills, and

experience — but they don't feel it's enough. It's a head scratcher for people who aspire to achieve their level of success; for that person, the negative self-talk holds them back from achieving greater goals.

[Dr. Daniel Boscaljon, Director of Research and co-founder of the Institute for Trauma Informed Relationships](#), explains, "Your identity is the foundation that limits your sense of what you can do. We tend to reinforce our sense of identity based on what's familiar."

For some people, that negativity is a safe and familiar place. [New York-based therapist Mollie Spiesman, LCSW](#), says this is especially true for women. "We're trained

to think the worst of ourselves. If we think too highly of ourselves, we can get hurt if we don't get the promotion, or job offer."

While thoughts are automatic, Spiesman points out that we can control how we react and communicate with those thoughts.

Challenge your inner monologue to gain perspective.

The easiest way to do that is to question the message.

- Where does it come from?
- Is it based on experience or someone else's opinion?
- Is it a manifestation of fear?

Spiesman offers the

example of someone looking for a new job. "Say you have a thought that says you are not successful, you're not going to get a new job. Ask yourself where this is coming from.

Challenge the thought by asking yourself, 'have I ever gotten a new job in my entire life?'"

Before you accept a thought, make sure it's based on evidence.

Anderson-Kahl says we need to learn to recognize negative patterns. "The first step is to develop awareness by actively listening to your inner voice and pinpointing instances where doubt or criticism emerges."

Affirmations and kind self-talk are also valuable tools for reframing your inner narrative.

He suggests creating

affirmations that align with your goals and values and repeating them regularly. It may sound silly to some, but this simple action can go a long way to overwriting outdated



beliefs that are holding you back.

It's all about making a choice.

[Dr. Avigail Lev, founder and director of the Bay Area CBT Center](#), says "We must differentiate between automatic thoughts and trained self-talk." She says that training ourselves to

develop self-talk offers us the flexibility to choose our behaviors, take effective actions, engage in risk-taking, conduct cost-benefit analysis, and even face scary situations to achieve what we need.

Cognitive behavioral therapy (CBT) is a proven technique for changing our thought patterns, but it takes time and mindful effort.

Fleischman states, "The most important thing to remember is just

because you think it, doesn't make it so." Sometimes, we confuse our thoughts with actual facts. That's really important to understand. A thought is just a thought and we can change it.

Habits that took 30, 40, or 50 years to develop can't be changed overnight.

**Your thoughts are always there.
Learn how to make them work for
you.**

The good news is that they don't have to.
It's a process. Any change, even something as simple as questioning a thought's validity, can give us a reprieve from our inner critic.

As Spiesman says, "We're always going to have thoughts, but with practice you can consciously learn to reframe the negative and nurture positive self compassion."

Words have power. Even more so when they are part of your own inner monologue.

Final thoughts

While it's not uncommon to have moments when negative self-talk seems a little louder than your compassionate words, it should not be the driving force.

Don't be afraid to ask for help if you feel

overwhelmed or would like guidance on how to challenge or change your inner narrative. All the experts I spoke with have websites with useful tips and information. Several, including [Mollie Spiesman](#) and [Rachel Fleischman](#), offer virtual as well as in-person counseling. ✓



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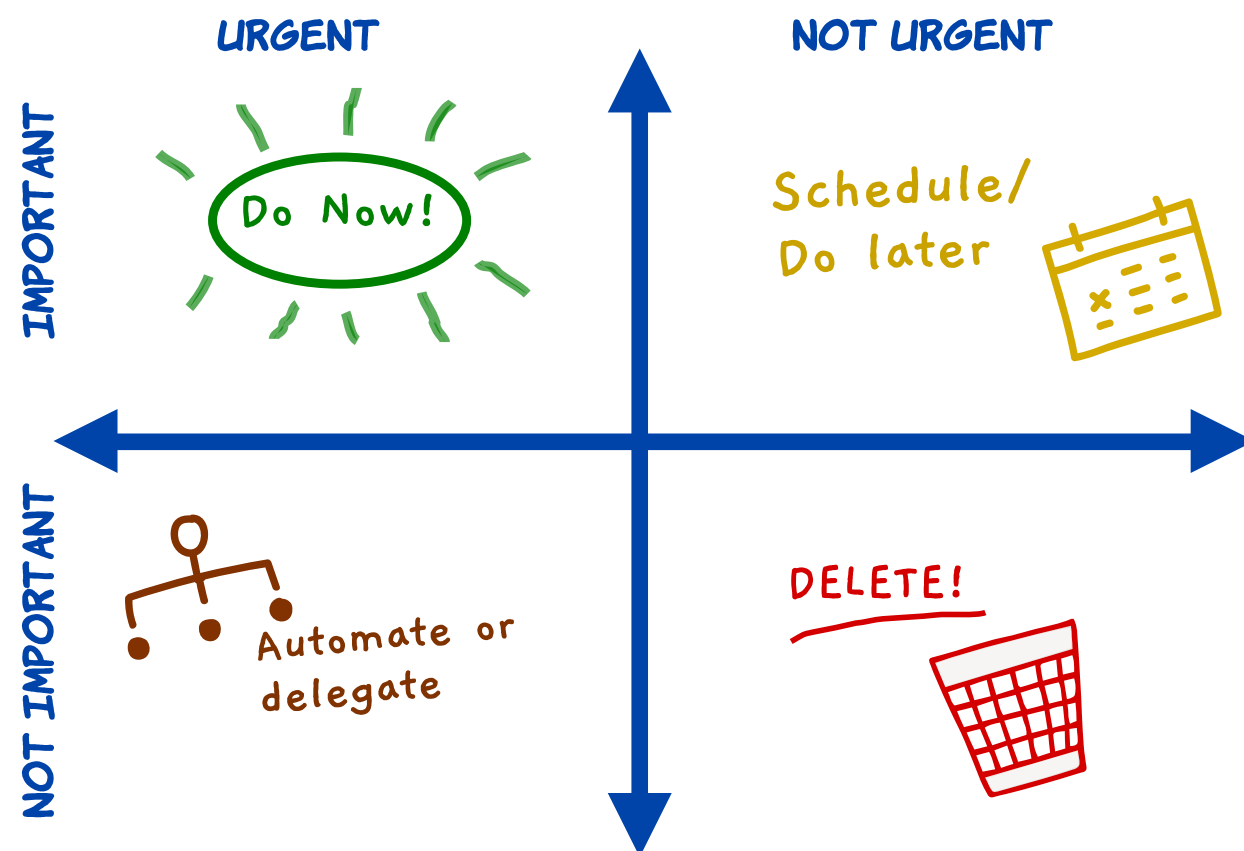
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One Simple No-Tech Tool to Prioritize All Your Tasks

By Pat Hammond, The Business Guild

EISENHOWER MATRIX



Does it ever feel like no matter how hard you work, there are still way too many things that don't get done?

It's frustrating, right?

Why is it such a challenge to get things done? You work hard and you know you're good at your job.

You never had these time management issues when you worked for someone else.

Welcome to the world of the self-employed.

You may do the same job as you did in the corporate world, but the realities of your day-to-day workflow are quite different.

Back in the cubicle, the company provided a framework of checks and balances to guide you through your projects and daily activities.

Most of your tasks were job specific. Marketing people didn't manage payroll, and techs didn't have to write social media posts.

Between expensive productivity tools and managers asking for updates, the priorities of your job were obvious and easy to

manage. You may even have had other team members who could lend a hand if things got hectic.

Now that you're your own boss, you have a lot more duties and it can feel like many are urgent or important enough to make it to the top of today's tasks.

But you know what? **Most of those tasks aren't urgent, and the ones that are may not be important enough to worry about today.**

This is where the Eisenhower Matrix comes in.

President Eisenhower, a former five-star general, understood that simplicity and clarity were key to organizing big projects and day-to-day operations.

Imagine trying to coordinate a war effort with fronts in both Asia and Europe.

This was Eisenhower's job.

He had to manage troops, equipment, and supplies on opposite sides of the globe. And it had to be done quickly, with limited resources.

If a task is neither urgent or important, it's just busy work. Delete it.

Eisenhower didn't have the luxury of phone apps and cloud platforms. What he had, however, was an understanding of how to prioritize in the trenches.

Instead of getting bogged down in the minutia, he focused on the concepts of urgency and importance.

This is where many people get lost. Not all valuable activities are urgent or important. Just because something is on your to-do list doesn't mean you have to do it today.

Let's look at what constitutes an urgent or important task.

Urgent = Putting Out Fires

- Requires immediate action
- There are consequences for not doing it now
- These are often unplanned activities

Important = Long-Term Value

- Advances a goal
- Usually more involved and requires planning or thoughtful action
- Importance can be subjective

With these definitions, Eisenhower made a basic grid and separated tasks into one of

four categories with an assigned action.

1. Urgent and important → Do now
2. Important, not urgent → Schedule for later
3. Urgent, not important → Automate or delegate
4. Not urgent or important → Delete

HOW TO USE THE EISENHOWER MATRIX

The simplicity makes this tool brilliant. We all know how easy it is to get overloaded when you're a one-person team. Things that seem important in the long-term can distract you from more pressing tasks.

The Eisenhower Matrix makes it easy to test your daily activities and identify their priority.

All it takes is a pen and a piece of paper. Once you have your supplies, draw two intersecting lines. (Think large plus sign +).

Label the left column 'urgent' and the right column 'not urgent'.

On the left side of the grid, label the top row 'important' and the bottom row 'not

important'.

From there, it's just a matter of reviewing each item on your to-do list and writing it in the appropriate box on the grid.

This is especially useful when you get one of those calls that sends your day sideways. Instead of wondering how you'll handle one more thing on an already busy day, the matrix can help you determine which things you can reschedule or delegate.

THE PROS & CONS

If your to-do list is too long, the Eisenhower Matrix is a handy tool that can help you quickly prioritize your tasks.

The downside is that it is more of a triage tool.

The quadrants lack the nuances that go into thoughtful time management and can quickly push your days into a never-ending state of urgency.

I like the Eisenhower Matrix for days when I'm on a tight deadline or have an unexpected interruption, but it's only one part of my productivity system. Most of the time, my days are a combination of time chunking and the Pomodoro technique. (Downlod Stop Wasting Time: A Quick 411 About Time Management for a breakdown of these techniques.)

Today's Tasks

	Urgent	Not Urgent
Important	List tasks that are both urgent and important	List tasks that are important, but not urgent
Not Important	List tasks that are urgent, but not important	List tasks that are not important or urgent

Urgent & Important - Do Now

Important, Not Urgent - Schedule

Urgent, Not Important - Delegate

Not Important, Not Urgent - Delete

Download Today's Tasks/Eisenhower matrix worksheet.

If you struggle with too many tasks and prioritization, give the Eisenhower Matrix a try.

I've put together a quick worksheet called Today's Tasks/Eisenhower Matrix to help you quickly organize and prioritize your outstanding tasks.

Give it a try. You may just find that it's the missing piece of your productivity program ✓



How to Overcome CRM Overwhelm: A Conversation with Veronica Hugh

By Pat Hammond, The Business Guild

I'm going to start by saying that I am not a Luddite. I love technology and all the possibilities it represents, but customer relationship managers (CRMs) befuddle me.

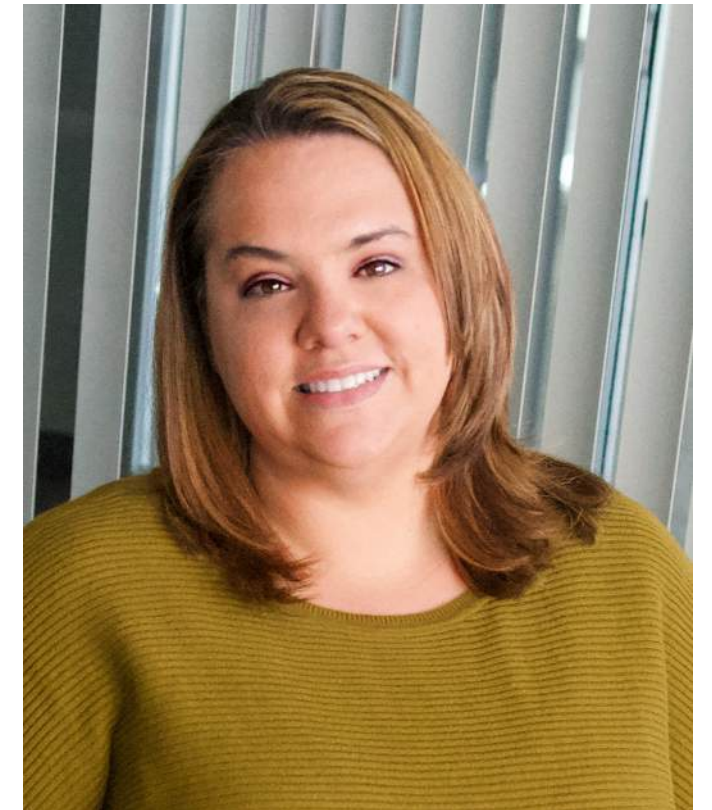
To a small business owner, CRMs represent the Holy Grail for small business independence. They help us automate tasks and fill our sales funnels. And they make it easy for solopreneurs and small teams to manage large volumes of customers, vendors, and other contacts.

The problem is that you need to be an expert at marketing and sales support to use them.

You also have to be a whiz at planning and building databases. And once you master those skills, you have to tackle the learning curve of whichever platform you choose. (Sorry, even the *easy* CRMs have challenges and limitations.)

I'm an intrepid techie. I'm not afraid to wade in and peek at the code, but I have yet to find a CRM that hasn't flummoxed me. Then I met [Veronica Hugh from PC Consulting](#).

Veronica is a bona fide Salesforce expert



Veronica Hugh, founder PC Solutions

with over 20 years' experience in sales support and customer relationship management. She understands pipelines, workflows, and all the nitty-gritty details that go into managing sales, marketing, and customer relationships. And she graciously agreed to sit down to answer my questions about choosing and using a CRM.

Pat: We hear a lot of hype about CRMs, but many people get by fine with a basic spreadsheet. Who should use a CRM and why?

Veronica: CRMs are a great tool for anyone who's at a point where they want to track revenue, prospects, and which marketing efforts are coming to fruition.

Start by thinking about the problem you're trying to solve...

You may not need a CRM when you're starting out, but once you get to the point where you have a lot of customers and want to see who your prospects and customers are, you might. CRMs can aid with anything you want to look at, to include which opportunities are in the pipeline, which are closed, and the next actions to take.

Pat: CRMs are typically designed for teams. What are the benefits of using a CRM for a solopreneur, coach, or consultant?

Veronica: I think CRMs benefit a lot of different types of businesses. One of the biggest benefits is being able to see the information in a system, who your

prospects and clients are without you having to remember it.

We all have so much going on, it's impossible to remember who you're supposed to follow up with, who you promised a proposal to. Sometimes we use our calendars, sometimes we use our notebooks or post-it notes. I think having a CRM helps us with our efforts.

Pat: What is the biggest challenge people have setting up a CRM?

Veronica: I think it's not knowing what the system can do for you and the full potential of what it can be.

When people open Salesforce, there are so many options. They can't envision how to make it work for them, and without the vision, it becomes overwhelming.

It's really about figuring out what business case you're trying to solve before you shop.

Partnering with someone who can help you understand what a CRM can do for you and put the business case you're trying to solve into a CRM can take a lot of the confusion and overwhelm out of the situation.

3 things to consider before you shop:

1. What type of information do you need to capture?
2. Does the system allow customization? (Including reports!)
3. What's your budget?



Looking for more tips? Check out the latest Success Funnel podcast!

Pat: How long should it take to set up a CRM?

Veronica: A good startup plan for less than 10 employees should be 3 - 4 weeks.

A large company that's migrating from another system could be 9 months.

We can start simple for your basic needs and build out as you get familiar with it.

We offer a Get Started program where we have a meeting every week and go through your use case. We'll build it out in Salesforce and the following meeting we'll show you what we built, get your feedback on it, and make any tweaks or edits and go through the next steps. A basic implementation will cover accounts,

contacts, leads, opportunities, tasks, and security settings.

Pat: What should people think about before they look at CRMs?

Veronica: Think about what problem you are trying to solve. Pick the top two things and make sure the platform you select is going to solve those two problems for you. What kind of data do you have and what is the format? Do you enter manually or import it?

How tech savvy are you? What are you trying to use the system for? Leads, prospects, accounts, quotes, orders — what problem are you trying to solve?

Pat: What are the benefits of choosing Salesforce over a free or basic platform?

Veronica: Salesforce is the number one CRM for a reason. It's what they do. There has not been a use case that I can't build into Salesforce.

Other systems can be rigid. Some have required fields you don't need or can't customize to fit your use case.

Salesforce can customize almost anything in the system and it doesn't matter how big or small your business is.

It works for every company,

from GM to a local store tracking vendors, or project management.

It's a great system from a pricing and usage perspective. There are so many things you don't realize you can do.

You can create a site within Salesforce for customer tech support. You can also set up forms for lead generation, manage subscription renewal notifications, so many things.

Even if you're looking for something simple now, having that ability to grow and integrate other tools can save you time later.

Pat: How can you help people to choose or set up a CRM?

Veronica: My first love is process, automating things, structuring processes, fixing broken processes. The unique thing I bring to my clients is that I'm not just a Salesforce architect and administrator. I can help you fix or build your processes.

I partner with my clients to build a workflow to reach their perfect solution, easier, more visual for them.

You can tell me about your workflow and use case and I can create a custom build in Salesforce to do it. ✓



Are you overwhelmed by CRMs?

Be sure to read these articles from Flackery magazine and The Business Guild

- ▶ How to Look for a CRM Without Losing Your Mind
- ▶ Build Strong Business and Customer Relationships Using a CRM

Every business has a voice, let's capture yours.

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The Ultimate Guide to the Commonplace Book & Why You Need One for Your Business

By Pat Hammond, The Business Guild

How many apps do you use for things like business notes and brain dumps? One, three, five, too many to count?

Platforms like OneNote, Notion, and Google all promise to be the perfect solution for gathering your ideas, jotting down notes, and pinning inspiration. And to some extent, they do. But none offer a universal solution. A single, common place to write your ideas whenever or wherever they happen. You see where I'm going with this, right? I would like to introduce you to a handy little tool called a commonplace book.

What is a commonplace book?

Similar to a copybook, a traditional commonplace book was used by students to take notes and write lessons. They credit the original idea to renaissance-era theologian, Desiderius Erasmus, but it was likely used by monks and scholars well before the 1500s.

Over time, the commonplace book became more like a scrapbook of information than a study tool. Unlike a

journal, which is usually a collection of thoughts or a remembrance of the day's events, commonplace

books provide users with a

common place to store the bits and bobs of ideas and information that pop up during the day.

- Quotes
- Meeting Notes
- Ideas & Inspiration

By the nineteenth century, commonplace books transitioned to the business world, where they were widely used to keep notes, ideas, and reference material.

One noteworthy example is a commonplace book from the father and son team, William and John Maude. In addition to calculations and charts used for customs, the Maudes kept a commonplace book with recipes for things as diverse as medicine, beer, and ink. Their work also included general reference topics, such as bookkeeping. (Kind of like all those sources you pin on Pinterest, then can't remember where you put them...)

The perfect tool to boost creativity, and improve memory and critical thinking.

Why is a commonplace book better than a digital notebook?

Digital note-taking tools are convenient for searching content; and copying and pasting snippets, screen shots, and links, but they're not always the best tool for the job.

Taking pen to paper is a tried-and-true method for boosting retention and creativity. Countless studies have documented that writing notes by hand not only uses parts of the brain that boost retention and creativity, but reduces distraction and improves focus. — The opposite experience most of us have using digital tools.

[In an abstract for the Association of Psychological Science,](#)

researchers Pam A. Mueller and Daniel M. Oppenheimer cite several studies that illustrate the beneficial role of handwritten notes for comprehension and retention. The reason for this advantage is that digital note taking is little more than mindless transcription. On the other hand, writing by hand

forces the brain to absorb the content and draw conclusions.

How to use a commonplace book for your business

The only rule for making a commonplace book is to keep it simple. As for what material or format you use, it's up to you. President Ronald Reagan used basic



All your thoughts in one place - no more lost sticky notes.

index cards to jot down thoughts and keep notes. Other people have repurposed standard bound journals or simple marble-covered copybooks. Users traditionally divided commonplace books into sections for different topics, but it's not required. Most business people use their commonplace books for doing brain dumps and making notes. The books are a great tool for fleshing

out ideas and collecting all those passing thoughts that usually get relegated to a sticky note.

My current commonplace book is broken into sections for The Business Guild, Flackery, TBG Annual Playbook, newsletter, webinars/classes, and miscellaneous notes.

I've also had success using free-form notes, though it can be a challenge to find things if you don't have an index or table of contents.

However you set it up, the most important thing to remember is that your

commonplace book is a reference tool, not a to-do list or journal.

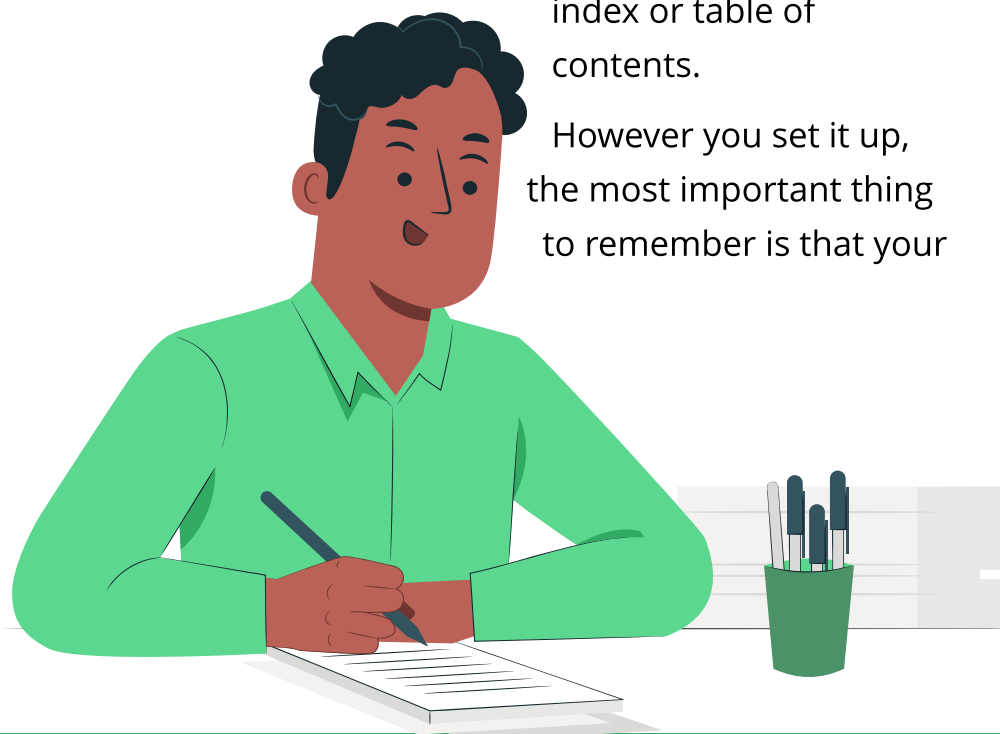
Wrap up

No matter how you look at it, commonplace books are the perfect tool for a busy small business owner.

Between the low barrier of entry and ease of use, the commonplace books are a convenient way to organize your thoughts and ideas in a central location.

If you're looking for a tool that is easy to use, doesn't require complicated logins or two-factor authentication, and never needs a charge, give a commonplace book a try.

It may be old school, but it just may be what you need to gain the advantage for your business.✓



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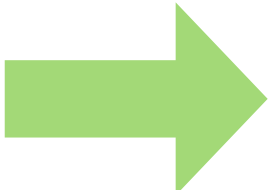
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Business Resources

It would take the entire magazine to list resources for every city, state, or county, so we're including direct links to the corresponding resources pages on The Business Guild's website. If you're looking for a resource that isn't listed, please send an email to info@thebizguild.com and we'll try to help you find what you're looking for.

Free and Budget-Friendly Resources for Your Business

Business & Strategic Planning

This includes federal business resources, useful tools, and all of The Business Guild's business planning templates.

Web Design

The web design resources feature useful tips for choosing a CMS, building a website, improving page speed, and managing site maintenance.

Graphic Design & Video

The section covers graphic design tips and links to several free graphic design programs as well as helpful information about video setup, recording, and editing

Sales & Marketing

Sales & Marketing has info about ERPs and CRMs; tips, tricks, and strategies for boosting sales; top picks for email marketing programs; templates for sales and marketing campaigns; and links to community partners.

Classes & Training

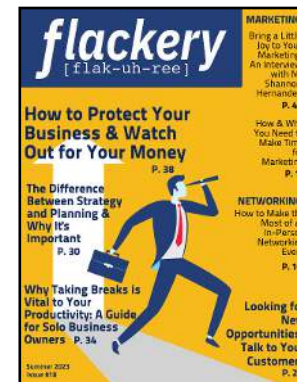
The classes & training section offers a collection of live and on-demand classes, events, and seminars from The Business Guild, our members, and community partners.

Back Office

This section contains a variety of back office tools and resources for your HR, accounting, and IT questions.

thebizguild.com/succeed

Past Issues



Summer 2023



Spring 2023



Winter 2022



Fall 2022



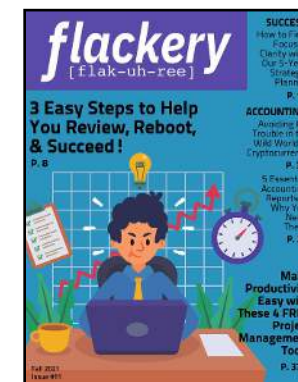
Summer 2022



Spring 2022



Winter 2021



Fall 2021



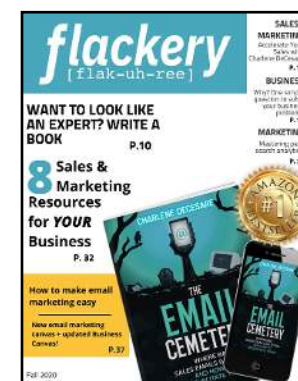
Summer 2021



Spring 2021



Winter 2020



Fall 2020

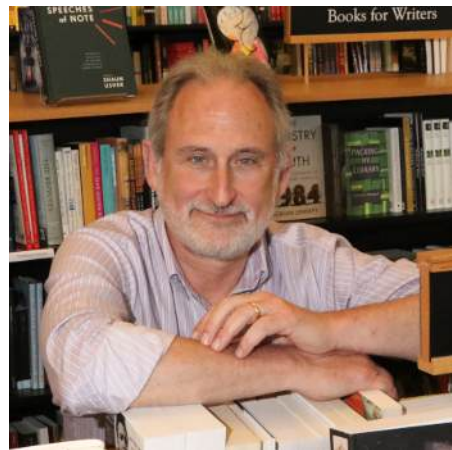
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"Failure is not the opposite of success.
It's part of it." -- Arianna Huffington