20+ BUSINESS LESSONS: ENTEPRENEUR'S HANDBOOK

Everything you need to know to succeed.

how we **solve**

How Creating a Mission, Vision, & Values Saved Our Company

CONTACT INFORMATION

🌐 TaskDrive

🌐 LTVplus

🌐 Shortlist

🎤 Managing Happiness Podcast

🎤 How We Solve Podcast

PERSONAL MISSION STATEMENT

David's personal mission is being a change agent who is transforming individuals and organizations so they can reach their full potential.

BEST RESOURCES

🔗 Simon Sinek - Start With Why - TED Talk

🔗 David Henzel's Medium article on nailing your company's mission, vision, and values

🔗 Managing Happiness podcast

managing happiness

David Henzel

David Henzel is the CEO of TaskDrive, cofounder of LTVplus and Shortlist, and podcast host of Managing Happiness and How We Solve It podcast.

He's a veteran entrepreneur who has been building businesses in the Saas and e-com space for over 20 years.

Problem: How to come up with your mission, vision, and core values statement for business?

Creating a mission, vision, and values was something David always thought is not needed. You only needed to put it into the presentation when you raise money. And then you buried somewhere on the website and you never look at it again.

It's actually a really crucial management tool. And through a north star of your organization that helps you to make the right decisions and not have the shiny object syndrome and, flow around like a leaf in the wind.

Where was the state of the business before David solve the problem of a mission statement?

They were around 50 people with MaxCDN when this problem occurred.

Initially, they had a clear mission and vision. They wanted to make CDN as successful as possible. They wanted to make it as accessible, as easy to use as possible, and also make it frictionless.

At that time, CDN was just an enterprise thing, you needed to sign a new contract and pay hundreds if not, thousands of dollars a month, and most small businesses and bloggers could never afford this.

> *"Core values allow you to know what behaviors you want to promote inside of your organization, and which ones you want to nix." – David Henzel*

> *"I think is really crucial to have one of the co-founders in these meetings." – David Henzel*

So, MaxCDN was the first CDN that made CDN accessible to everybody.

And that's where they messed up by not writing a mission statement down and not communicating it to all the new hires that they had. Their head of engineering wanted to build a data analytics engine on top of MaxCDN, which was great but for a small percentage of their customers.

> *"And the rest was like, OK, what do we do with this?" – David Henzel*

They realized that that was not the core of what they were doing. And that that was the reason why they were stuck and nothing was moving anymore. So, they sat down and figured out their mission, vision, and values. And once they had this and used this as a management tool, they took off again.

What steps did David take to establish a mission, vision, and core values statement for business?

- **Figured out your core values**

Core values are a really cool tool to know:

- *What kind of behavior they want to promote in their organization;*
- *What kind of behavior they want to get rid of;*
- *And what kind of people they want to hire who really fit their culture.*

Mission, vision, values are a tool that when you use them enough and you preach them enough, then everybody in the organization will be able to make decisions the same way you would make the decisions.
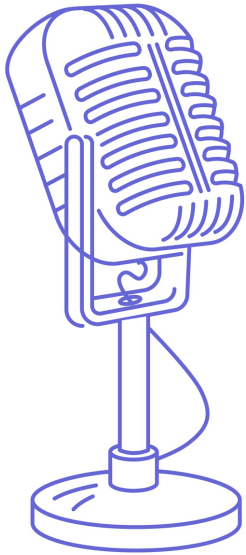
And this is like something is very crucial when the organization grows fast and grows big, that everybody kind of pulls in the same direction.

At MaxCDN, they assembled a committee of six representatives of the company from different departments and blocked out weekly reoccurring meetings of 90 minutes in their calendars. David was present as one of the co-founders.

At first, they had a collection of words like a word cloud. And then this turned to a statement.

After that, they also added a tagline to it. David suggests that you have a short version of the vision statement of the core value, so it's easy to remember.

Once they announced the finished core values to the entire team, they had these icons all over the office and posters and icons painted on the wall. And it worked pretty well, to actually use it in the day-to-day.

- **Come up with the commissioner mission**

When coming up with the commissioner mission, you should assemble your committee of people who are going to work on this - the leadership team. Then ideally meet outside of the office.

Watching Simon Sinek started Y. Ted, talk helped them to get into the mindset of like thinking about like why did they start this company? What was their personal motivation and what did suck in the industry that they wanted to change?

David recommends writing a cover story. He suggests imagining that 10 years from now, a big international newspaper writes an article about a tech entrepreneur who is in your field and they basically tell the story on what you have built-in these 10 years.

This gives you amazing material to work with when crafting your business statement.

- **Make sure that vision and mission actually stick**

Currently, at LTVplus they have a mission, vision, values call once a month with all the new hires, to make sure that their vision and mission stick and that they hire the right people.

David walks through Mission, Vision, Values, and tells some core value stories on employees that really have displayed their core values by doing X, Y, Z, so that people could relate through stories on what this is.

Besides that, they also ask people to sign the core value sits at the end of our contract that they signed with them, saying that I commit to following these core values. David says that the system works really well for them.

Lance Crosby, the Founder at StackPath told David that the CEO has only three things that he has to do:

1. *Make sure there's enough money in the business for fundraising and the money's coming in;*
2. *Hire smart individuals in the key positions and then leave them alone;*
3. *Repeat the mission of the vision like a parrot to the entire world, to a team, and everybody out there.*

How 1 Entrepreneur Went From 0% to 20% Response Rate on Cold Emails

CONTACT INFORMATION

🌐 Juhan Kaarma's Official Website

in LinkedIn: Juhan Kaarma

PERSONAL MISSION STATEMENT

Build cool things and make sure they are useful for other people.

BEST RESOURCES

🔗 Alex Berman's YouTube Channel

🔗 Close.io

🔗 Apollo.io

🔗 LinkedIn Sales Navigator

Juhan Kaarma

Juhan Kaarma is a Co-founder of ChatCreate. At ChatCreate, he's helping live chat support teams answer their customers' burning questions instantly. With ChatCreate's easy-to-use chatbot tool, support managers can setup and maintain chatbots themselves.

Wouldn't we all like to be getting a 60 to 70% open rate with a 20% response rate on our cold emails? Juhan Kaarma tells us how he did it.

Problem: How to figure out the way to grow ChatCreate and then find customers along the way?

When ChatCreate was first launched, most of their clients signed up for Zendesk software. So the goal for Juhan Kaarma and his co-founder was to find companies that were already using Zendesk.

> *"So it was like, okay, how do we find these companies that are using Zendesk?" – Juhan Kaarma*

Their first step was to use different online tools like Intercom or BuiltWith, to check what software the company is using. But when they reviewed all these lists they'd received, they realized that the data was expensive and very often incorrect. The tools pulled a thousand companies and only 200 of them would be actually using Zendesk software.

So they downloaded the list of top 1 million websites in the world. The list was from 2013, but it was freely available. They built their own custom script that scraped those websites and then informed them which ones are actually running Zendesk. What they found is that data was way more accurate.
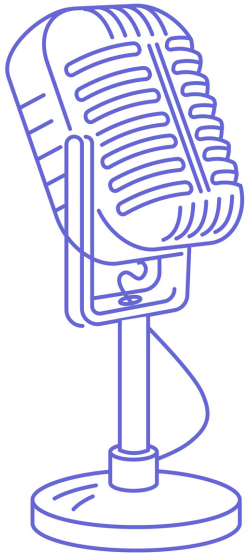
The other challenge for them was approaching companies that are already using Zendesk chat. Some of the companies were using only support but not the chat product. Thus, they had to manually validate that.

Once they had the list of those companies:

> "So it's like, okay, how do we reach out to them?" – Juhan Kaarma

At first, they were using LinkedIn to find people in those companies. But they quickly realized that it is very time consuming and not efficient at all.

After that, they found out that Apollo.io is a critical tool where the user can upload a bunch of domains, and the tool returns the list of companies and people who work in those companies, along with their contact information, different job titles, etc.

When they had the contact information and the email addresses, it was time to reach out to them. Juhan has never used cold emailing before, and their first results were really bad. From sending 40 emails, they got a 20% open rate and 0% of responses.

Juhan found a YouTube channel, Alex Berman, and learned from watching those videos.

> For two days I was just watching these videos, like on how to do cold emails and just started testing around and playing around different subject lines." – Juhan Kaarma

After that, he went through around 10 or 20 rounds of iterations and every time getting a little bit better. Now, they have gotten to a point where they are getting pretty much constant, around 60-70% open rates, and around 20% response rates with the first follow up.

Juhan thinks that one of the best working copies that works best for them is where they ask people:

"Hey, I was checking out your company, and we'd like to talk to the person responsible for this chat channel, for example. Can you help us get in touch with that person?" And usually, the responses are very positive.

"And if your message resonates with them, then it doesn't really matter if you have that much personalization in there or not." – Juhan Kaarma

"For us, it seems like one follow up is the optimal amount, and that works very well." – Juhan Kaarma

3x Founder Matic Užmah Shares 3 Keys to a Successful Venture

CONTACT INFORMATION

🌐 SupportHero

🌐 ReferralMagic

🌐 Contact Dome

in LinkedIn: Matic Uzmah

PERSONAL MISSION STATEMENT

- Work hard, harder than other people, or harder than people think I should work.

- We should be doers not talkers at least not too much.

- Find an intersection between what are you good at, where do you enjoy working and where do you provide value for others.

BEST RESOURCES

🔗 Lost and Founder: A Painfully Honest Field Guide to the Startup World by Rand Fishkin

🔗 Shoe Dog: A Memoir by the Creator of Nike by Phil Knight

🔗 Steve Jobs: A Biography by Walter Isaacson

🔗 Never Say Never - The Alibaba Founder Jack Ma's

🔗 The Republic by Plato

Matic Uzmah

Matic is a SaaS founder, who recently sold his company, SupportHero, In-App self-help support tool that provides an advanced knowledge base system for SaaS apps - www.supporthero.io.

Support Hero has proven highly effective, helping businesses gain a deeper understanding of customer behavior, streamline customer support requirements and reduce support tickets by up to 50%.

The company got acquired in March 2019. He co-founded referral tracking software, ReferralMagic, and Contact Dome, an app that helps to discover the full potential of your network and unlock hidden opportunities - Contactdome.com.

He didn't start 1 company. He started 3. Sold 1. And he's onto his next 2 already.

Matic Užmah shares his view of what makes a venture successful.

Problem: Implementing referral program - right timing

They launched SupportHero on Appsumo and then on Product Hunt. And only after that they tried to implement referral program, which didn't make sense.

First you have to implement the filter program and then drive traffic to your site and the same level for onboarding.

When they implemented a referral program, they started to notice the users slowly churn. After six months, they didn't get any conversions from that program.

"The biggest mistake was we didn't have the referral program in place before we launched." – Matic Uzmah

How to find North Star metric?

Matic says that they have found North Star metric for their company by talking to clients. He thinks of it like an intersection of three things:

- *Talking & listening to customers;*
- *Getting all the data;*
- *Using your common sense when you're interpreting all of this.*

Matic says that listening to customers is probably the most important thing to do. One of the mistakes that Matic made, was thinking that he knows better than customers.

"Steve Jobs said don't listen to customers because they don't know what they want. He was right, but he was Steve Jobs." – Matic Uzmah

Matic noticed that usually people don't want to talk to their customers, they postpone the calls and just set up impersonal Facebook campaigns. He considers this to be a great advantage for those who still talk to their customers in person or via the phone.

He thinks that if people don't want to do this, and you're doing it, then it could be your advantage over your competitors.

Another thing is that people spend a lot of time with their computers while building products and don't network enough. Matic suggests to do just one call with a customer in the morning and customers sharing their positive feedback about your product or service will give you the energy for the whole day.

"Stick with what you know, the market you know, and the customers you know." – Matic Uzmah

CHECK OUT THE PODCAST

Apple Podcasts   Spotify

Stitcher   Google Podcasts

"But it was not luck, it was building a relationship on the long run, doing extra work every day, running extra mile or working extra minute." – Matic Uzmah

6 Steps to Creating a Successful Remote Work Environment

CONTACT INFORMATION

🌐 Shauna Moran's Official Website

in LinkedIn: Shauna Moran

✉ info@operateremote.com

PERSONAL MISSION STATEMENT

Empower and transform distributed companies, by supporting founders and management teams and helping them to build emotionally healthy and high growth teams in remote environments.

BEST RESOURCES

🔗 Mindset by Carol Dweck

🔗 The Culture Map Erin Meyer

Shauna Moran

Founder of Operate Remote. A coaching and consulting firm specialized in supporting businesses with remote and multi-location teams.

Shauna helps her client gain true strategic clarity on their teams working operations; to achieve excellent & measurable results, and to do it quickly. As a coach, Shauna brings emotional intelligence and leadership development strategies to empower teams, regardless of where they are located.

Human behavior and psychology have always fascinated Shauna. They've influenced her education, her work, and her passion. After studying psychology for her undergrad, when worked at Shopify, remotely managing their channel partnerships while obtaining her PhD in Innovation Management.

Now, with additional certifications in executive coaching and emotional intelligence, she's leading Operate Remote, a consultancy and coaching business focused on empowering remote and hybrid teams to work more effectively and efficiently.

She's also part of a community in Ireland called Grow Remote, which does events around Ireland educating businesses and community about the benefits of remote work.

The problem: remote work can be challenging to manage

Shauna started Operate Remote because she knew that working remotely was both an opportunity and a challenge:

Studies have shown that remote teams perform better than non-remote teams, and Shauna knew from her own experience that she loved working remotely.

Still, it was a challenge for her to effectively manage communications, culture, individuals, teams, projects, and onboarding new hires.

So she wanted to diagnose the issue and discover what separated the positive from the negative with remote work.

> "I wanted to know: what is it that makes remote teams successful in what they do? What's the formula?" – Shauna Moran

What makes remote teams successful?

So, that's how she got to this point — her work in neuroscience, her executive coaching experience, and her personal experience working in remote set her up to solve the remote work complex.

Overall, she's realized that the issues don't just involve logistics — emotional intelligence is an especially important aspect of remote teams.

Overall, Shauna's found that, increasingly, remote teams are almost too productive, leading to burnout and isolation, often creating retention problems for the employers.

But from her research and experience, she's found a few keys that will help any remote team find success:

1. Make expectations clear

Setting expectations early on avoids huge problems later; this is perhaps even more important with remote teams, as there is no physical "office culture" to help shape behaviors.

- *Do you expect workers to login to Slack every day?*
- *Do you expect daily/weekly/monthly updates on projects?*
- *Do you want remote workers to use video so there's a visual interaction?*

2. Set boundaries

Boundaries are incredibly important in remote work, as there is no cultural office closing time, and the digital mobile age has created an environment of nonstop connectivity. There's no "off switch."

Also, there's the issue of timezones, which Shauna knows this all too well — while at Shopify, she was managing teams in 10 different time zones.

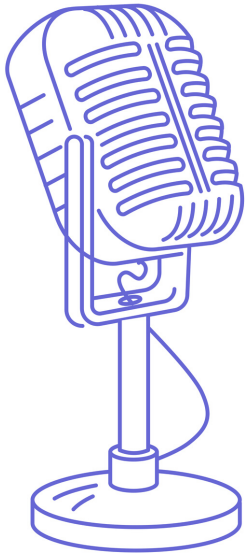### 3. Employees should take responsibility for themselves

Managers can help by setting boundaries and expectations, but ultimately, it's the worker's responsibility to ensure they know how to set their own boundaries, take breaks when needed, spend time with their family, etc.

> *"Proactive communication & transparency are the lifelines for making remote teams successful." – Shauna Moran*

4. Set an example

This one's pretty simple: if the team leader is working 12 hours a day, but saying "don't work 12 hours a day" at the same time … it simply won't work.

People follow examples more than words.

5. Fast-track trust within the hiring process

The issue of trust comes up consistently, Shauna says: employers are constantly asking, *"How can I trust my employees if they aren't in the office?"*

Your hiring process is perhaps one of the best places to invest in when trying to create that trust.

To start with, leaders must clearly define what they believe helps create trust; then, they can hire accordingly, knowing that half the battle is already won just by hiring to those qualities.

6. Create remote-first processes

As anyone who's worked on a remote team knows, documentation and tech stack become even more important without the traditional office environment.

Document everything, and ensure the tools your team are using are created with a remote team in mind.

> *"Boundaries are incredibly important in remote work, as there is no cultural office closing time, and the digital mobile age has created an environment of nonstop connectivity." – Shauna Moran*

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> *"Setting expectations early on avoids huge problems later" – Shauna Moran*

2 Ways to Face (& Beat) Disruption

CONTACT INFORMATION

🌐 Rishi Sharma's Official Website

in LinkedIn: Rishi Sharma

📷 Instagram: @rish__sharma

📞 Phone number: 650-433-9572

PERSONAL MISSION STATEMENT

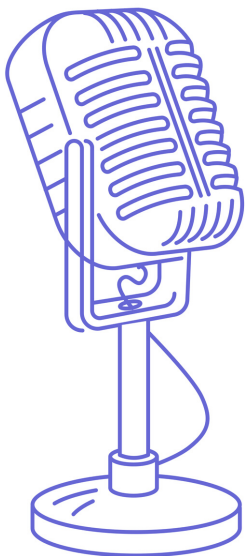Dreams + reality + determination + empathy = successful life.

BEST RESOURCES

🔗 Principles by Ray Dalio

🔗 Influenced by Robert Cialdini

🔗 Think Simple by Ken Segall

🔗 Headspace (mediation app)

🔗 Fitbod (fitness routine app)

Rishi Sharma

My passion for building impact DTC businesses can be traced back to my young days. Whether as a Starting my entertainment company in High School or part of the Head of DTC at Q-See., I've been on a entrepreneurial path from the start. The reason? I like getting people excited about the things I'm excited about. Right now, that's Mallama Skincare.

Outside of the office, I'm committed to charitable causes through 1% Percent for planet and Soon be Pencils with Promises . I'm as looking to challenge myself with new activities and hobbies, recently I picked up Guitar, Surfing, and Improv . If you challenge me to Lakers trivia, I will win. I'm currently trying my hand at [very amateur] podcasting . I live the sweaty life and will probably invite you to join me for a Mediation at the beach or Game of one on one .

Rishi is a born entrepreneur.

So far, he's founded an entertainment company and a fashion company, and helped grow the direct-to-consumer portion of his family's home surveillance company (Q-See) to tens of millions of dollars.

Now, he's tackling his most passionate project yet: Mallama, an all-natural men's skincare company with a foundational focus on sustainability.

Rishi shares all about his company, and how he's ensuring he's the disruptor, not the disrupted:

Not enough companies are prepared for disruption

Rishi has seen firsthand the power of disruption upon an unprepared industry.

While leading the product division at Q-See, he said that when Ring and Dropcam came on the scene and disrupted the home surveillance category, Q-See wasn't fully prepared.

He thinks that maybe Q-See was slightly "overly romantic" about traditional home surveillance, and they didn't' believe customers were ripe for change. But, as we've all discovered, technology has disrupted every industry.

Since then, coupled with Rishi's own disruption of the skincare industry, he's learned a few lessons about staying ahead of the disruption curve.

> *"Focus more on why & who you're selling to and not so much on the what & how." – Rishi Sharma*

1. Focus on the why & who, not how & what

When you focus on the what and the how, it's easy to lose sight of the bigger picture, and disruption could side-swipe your business. But, when you focus on the why and the who, you aren't tied to a product. Instead, you're tied to a customer and solving their problems.

A constant "how can I help my people" mentality will encourage you to look ahead and consider the best options for them, helping immunize you from disruption.

2. Speak to your audience

Rishi took his time to position Mallama as a skincare company with high quality products that would rival any major brand. But he didn't stop there.

He also knew that today's audience cares about values — customers want to purchase quality products from brands that stand behind principles they also care about.

This was easy for Rishi — he had always believed in the power of businesses to advocate, and climate change has remained a foundational pillar of the company.

> *"There were no good all-natural skincare options" – Rishi Sharma*

How Startups Can Create a Customer-Centric Product

CONTACT INFORMATION

🌐 Romain Lapeyre's Official Website

✉ Romain@gorgias.io

PERSONAL MISSION STATEMENT

He joked that, as a European, he didn't like to make bold statements about his life, but if he had to, he'd say, **"automate work with data."**

BEST RESOURCES

🔗 The Lean Startup — a must-read book for any startup

🔗 Personal MBA — Romain said this book is worth his entire MBA

🔗 Higher Output Management — by Andrew S. Grove, former Intel CEO

Romain Lapeyre

Romain is the co-founder and CEO of Gorgias, the customer service platform that helps e-commerce websites sell more.

Romain started Gorgias with his co-founder Alex in Paris in 2015 right after college in Paris.

Their initial product was a Chrome Extension to insert templates in emails. Soon, they realized that support people where the most active users, and they started working on improving the life of support agents.

Gorgias Co-founder and CEO, Romain Lapeyre, is focused on building 1 solution — the exact solution his customers want. He shares his 3-step process to creating the exact solution to the exact problem your customers have.

The challenge: Building the exact solution your customers are seeking

When Gorgias was first starting to build their help desk, they needed input from the market on what features their product should have. At first, Romain's team used a 1-to-1 approach to feedback: They were able to ask potential customers what features they wanted. Then, they programmed those exact features into the product.

But, as Gorgias grew, the problem morphed into:

How do we listen to our customers at **scale**?

Romain found a way. Even when you have over 2,000 customers, Romain's 3-step approach helps you incorporate your customers' product requests into your product.

GORGIAS + ROMAIN'S BACKSTORY:

Romain is a self-described productivity nerd — whenever he finds himself doing something multiple times, he begins looking for a shortcut, which is why he co-founded Gorgias.

Gorgias started about 4 years ago with the basic premise of saving time for people who write many emails. Originally, Gorgias helped build templates so people could respond faster when they were writing multiples of the same responses, like calendar links or a repeated answer to a repeated question.

Romain and his cofounder, Alex, realized that most of the users were customer support agents.

Thus was born Gorgias 2.0.

Gorgias is now a customer support help desk specially designed for e-commerce stores. It integrates with major applications, such as Shopify and Slack. They work with over 2,000 brands, like Steve Madden and Rothy's, to name a couple.

What steps did John take to starting and maintaining this business?

After realizing what he needed to do in order to run a successful business for himself, he looked for the tools needed to do so. While he wasn't hiring employees, that didn't mean that he wasn't hiring at all. His next option was to ponder over contractors but this led to another epiphany: contractor agencies.

> *"The success of a company is based on how you listen to customers to fulfill their needs." – Romain Lapeyre*

Step 1: Collect & measure data

The success of your company is based on how well you listen to customers to fulfill their needs.

The first stop is data collection. You'll want to list out the touch-points you have, to determine all the potential sources of inputs.

For Gorgias, they use these inputs to collect data:

- NPS — (Net promoter scores)

- Support tickets — Every time a client asks for a feature their product doesn't have, a form gets filled out

- Collect sales questions — The sales team is constantly asked, "Does your product do x?" Again, this is documented

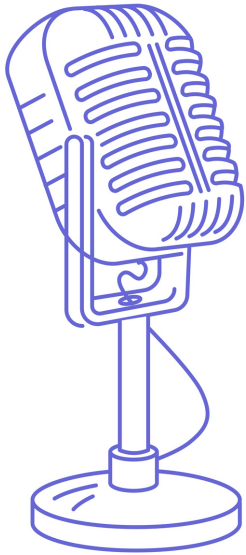## Step 2: Classify feedback

After you've collected data, you need a way to classify it into something meaningful. The best way is to map each piece of product feedback to a specific feature request.

Romain's team has collected about 5,000 data points so far, which are mapped to a total of 400 feature requests.

Step 3: Build accordingly

Once you've mapped your feedback data to certain product categories, you can then easily see what the top feature requests are for your product. Now, it's easy. Build accordingly.

What steps did John take to starting and maintaining this business?

And, when you do ship, ensure you let those customers know who requested those specific features: "You asked for feature x. We heard you, and here it is!"

Pro tip:

Ensure you don't send too many "updated features" notifications to your customers — you don't have to tell everyone each time you add a new feature. Just ensure you notify any customers who had specifically requested that update.

> "Once you've mapped your feedback data to certain product categories, you can then easily see what the top feature requests are for your product." – Romain Lapeyre

How do you know what measurements to use?

To ensure you are collecting the right metrics, Romain says to gather your team and determine: *"What are the elements we care most about?"*

Stay away from vanity metrics.

Be careful with vanity metrics; for example, don't measure things like, *"How many times has this feature been used?"* because that metic will always be going up. Instead, measure how many times a feature has been used within a given period.

Here's a good way to ensure you stay away from vanity metrics (or other unnecessary metrics):

Establish a few North Stars

For Gorgias, the most important element is: *"How fast do our clients respond to their customers, and has the satisfaction of their customers gone up?"*

From that launching point, Romain and his team have created 3-4 North Star metrics. They ensure every other metic is judged against those North stars; if a metric doesn't illustrate how one of those North Stars are going up or down, they throw out the metric.

5 Steps to Positioning Your Product

CONTACT INFORMATION

🌐 April Dunford's Official Website

in LinkedIn: April Dunford

🐦 Twitter: @AprilDunford

📷 Instagram: @AprilDunford

PERSONAL MANTRA

I want to do good work, with good people.

BEST RESOURCES

🔗 Positioning: The Battle for Your Mind — by Al Ries & Jack Trout

🔗 The Four Steps to the Epiphany — by Steve Blank

🔗 The Jobs-to-be-Done Handbook: Practical techniques for improving your application of Jobs-to-be-Done — by Chris Spiek & Bob Moesta

🔗 Obviously Awesome: How to Nail Product Positioning so Customers Get It, Buy It, Love It — by April Dunford

April Dunford

Before starting her own consultancy, April worked at 7 different startups in a variety of roles, usually running marketing. Through her experiences transforming marketing at B2B tech companies, she became intensely interested in the idea that positioning is the underlying issue for all of marketing.

April went on to found Ambient Strategy, where she consults for B2B tech firms, helping them communicate their messaging and sell their products.

Before you start a campaign, run advertisements, or build content, you must know your positioning. Most of us know that.

But actually *doing positioning?* That's more difficult to explain.

April Dunford shares her 5-step process she uses to help brand position their product for maximum success.

Problem: Positioning is foundational. But how do you actually do positioning?

Before making the dive into marketing, April originally had a background in engineering. So, when she made the leap into marketing, she wanted to learn everything she could. She read *Positioning: The Battle for Your Mind*, and she quickly bought into the idea that positioning is the foundation for everything.

Most marketers would agree.

But April also realized that while marketers believe in the underlying importance of positioning, there really wasn't a methodology for doing positioning. So, as April moved through her career in marketing, she developed her own methodology for positioning.

Break positioning down into component pieces:

April thought she would break positioning down into the 5 common characteristics of positioning and then attack each one:

- *Market category*
- *Competitive alternatives*
- *Unique features*
- *Value you deliver to customers*
- *Which customers you're trying to sell to*

> *"Maybe we should reposition this product?" – April Dunford*

April thought that after breaking positioning down into these 5 components, the rest would follow. But April quickly realized that each of these components is related to the other (for instance, the value you can deliver to customers depends on the unique features of your products, which is dependent on the competitive alternatives).

So, she realized she needed a different approach.

The 5 steps of positioning

April recently released a book called <u>Obviously Awesome</u>, which outlines her unique positioning process, which she condensed and laid out for us on the podcast:

Step 1: Make the right comparison

Start by making the right comparison. Turn to your best customers — those who love you the most, who don't churn, who refer you to other customers, and who use the products as it is intended. Ask those customers what alternative(s) they would be using *if you or your product didn't exist.*

They may say they'd use a competitor's product, or they may even say, "We'd be using an intern or Excel."

Once you know what alternatives the customer would use without you and your product, ask:

Compared to those alternatives, what features do we have?

List those unique features out.

"The only competitors that really matter, are the competitors that your best customers think about." – April Dunford

"We need to start by making the right comparison, which is another way of saying we need to understand the competitive alternatives." – April Dunford

Step 2: Ask, 'How do those features add value for my customers?'

As you list out the unique features of your product, you'll usually see 2 to 3 value "themes" or buckets emerge — and those essentially form the basis of your value proposition.

Step 3: Understand why your best customers care so much about those features

Now, you want to understand why those features and this problem are consistently important to your best customers:

- It could be because they are all a certain size.
- Maybe they all use other complementary technology.
- Or, perhaps they all have a similar business model.

Understanding the underlying reasons why forms the basis of your customer segmentation.

THE POSITIONING PROCESS

Competitive Alternatives
If you didn't exist, what would customers use?
1

Key Unique Attributes
What features/ capabilities do you have that alternatives do not?
2

Value
What value do the attributes enable for customers?
3

Customers that Care
Who cares a lot about that value?
4

Market you Win
What context makes the calue obvious to your target segments?
5

@aprildunford

Step 4: Find your market, & position your product within that context

Now that you know why customers are buying your product, and you know your market segmentation, you want to find the best market to position your value. Essentially, you need to determine:

What context can I put around this value to ensure this value is appreciated?

> "Start by making the right comparison. Turn to your best customers — those who love you the most, who don't churn, who refer you to other customers, and who use the products as it is intended. Ask those customers what alternative(s) they would be using if you or your product didn't exist." –
> April Dunford

Step 5: Test your positioning

Hopefully, you didn't think you'd get out of this without testing this new positioning.

Here's a simple way to test whether or not your positioning is on the right track, assuming you've been in business for a while.

Build a new sales deck that captures the new positioning. Take your best salesperson, teach them the new sales pitch, and have them pitch that position to brand new prospects. *(Note: it's important not to use older prospects who've heard your prior positioning.)*

Then, ask your salesperson if the new positioning was better or worse than the old poisoning.

Example:

Here's an example of these 5 steps in action:

In one of her earliest marketing roles, April was working with a company that created a product that made a personal use database that could run SQL … or that's the product April's employer thought they had created.

Here's what happened when they released the product: Nobody cared.

They already had another product that was doing well, so their gut instinct after a few months was to toss this new product because it was performing so poorly.

Just so they knew which customers would be negatively impacted when they stopped supporting this new release, April called the 100 customers who did buy this new product. Only 6 actually cared that the product would cease to exist, and they weren't using it for its intended purpose at all.

But those 6 were loving the product. It turns out, they were all using it so their sales teams could take orders in the field, without having to go back into the office. This got April thinking. *"Maybe we should reposition this product?"*

She decided to reposition the product as a sales tool.

That changed the game.

The product, with its new positioning, sold incredibly well. They ended up getting acquired, and that product eventually became a billion-dollar business unit on its own.

> ❝❝
>
> *"Understanding the underlying reasons why forms the basis of your customer segmentation." – April Dunford*

> ❝❝
>
> *"Now that you know why customers are buying your product, and you know your market segmentation, you want to find the best market to position your value." – April Dunford*

The 4-Step Process to Pricing for Value

CONTACT INFORMATION

🌐 Paul Klein's Official Website

in LinkedIn: Paul Klein

🐦 Twitter: @PaulKleinTV

📷 Instagram: @PaulKleinTV

f Facebook: Paul Klein

PERSONAL MISSION STATEMENT

My overarching goal is to eradicate the world of hourly billing.

BEST RESOURCES

🔗 Jonathan Stark

🔗 Pricing Creativity, by Blair Enns

🔗 Implementing Value Pricing: A Radical Business Model for Professional Firms, by Ronald J. Baker

🔗 Pricing is Positioning podcast

Paul Klein

Business Scaling + Pricing Strategy Consultant for Existing (and Aspiring!) Business Coaches & Consultants

If you're an entrepreneur, there's no doubt you've struggled with pricing: How do you ensure you're charging the best rate for your services and offerings, without leaving money on the table?

Paul Klein is a position expert, entrepreneur, and business consultant. He also hosts his own podcast — Pricing is Positioning.

The problem: 'Most people undervalue their expertise'

Every entrepreneur knows the double-sided pain of pricing. Every dollar counts, especially in the early days, so you never want to price a potential client out, leaving much-needed dollars on the table.

On the other hand … are you charging enough?

And this is where the first battle lies, Paul said: convincing yourself how much you're worth. If you don't value your services, neither will the market. If you think you aren't worthy of those higher rates, then something happens with your thoughts, your actions, and the way you present yourself to the market, an employer, etc.

You've got to have an unwavering belief in your value.

Once you have that mentality settled, you're ready for Paul's 4-step process to pricing:

PAUL'S BACKSTORY

In the late 2000s, Paul was doing very well for himself.

He was settled with a $150k/year job at the height of the recession. He could settle in and coast to retirement at 55.

But by 2009, Paul couldn't do it anymore. He wasn't excited, and he was bored — so he took the entrepreneurial leap into full-time consulting.

Here's what he discovered in his decade of consulting:

Every company struggles with pricing, whether they are entrepreneurs, mom-and-pops, solopreneurs, to Fortune 500 companies and startups.

So, in 2018, he pivoted again, away from his consulting business, into pricing strategy.

Now, he helps other coaches and consultants with their pricing and positioning.

Step 1: identify which type of service business you want to be

Essentially, there are 3 types of service business:

- A commoditized service business. You don't want to be here — it's a race to the bottom.
- A productized service business. This is where you create one product and it serves many people (ebooks, an e-class, etc.).
- A customized service business — Where the highest value work lies.

Where do you want to be?

You certainly don't want to be in the first category.

Typically, you'll want to position yourself in the third, most valuable category, as a customized service.

> *"Most of us undervalue our expertise, our products, & our services, because it just comes easy to us." – Paul Klein*

Step 2: Price on value

Here's the mistake most entrepreneurs make when it comes to pricing.

They think it's all about their offering and solutions, and they price accordingly.

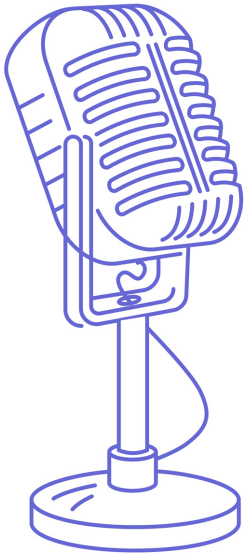But this isn't about what you can do — it's about what the client needs.

You must shift your thinking to learn more about the client's needs and their desired outcomes.

Then, you tailor your solutions to those needs, pricing your services to the value you are providing them.

> *"Pricing on value will set you apart from people who are selling from their own wallet." – Paul Klein*

When a potential client comes to you and says they want to buy your product or service, if you hand them a huge proposal which explains all the bells and whistles of your solution … you know what happens next?

The prospect skips to the back page, looks at the pricing and compares you to another competing product.

When the conversation is about your solutions, you're treated as a commodity.

But instead, if you have a conversation with your client, listening and diving deep into their needs, you'll gain 2 things:

- You'll have a relationship with your client.
- You'll set yourself apart from the competition, because you aren't just treating this prospect like another commoditized arrangement.

"When you say, see, or hear a price, that price will always anchor the discussion & the value." – Paul Klein

"If you don't value your services, neither will the market." – Paul Klein

"Every company struggles with pricing, whether they are entrepreneurs, mom-and-pops, solopreneurs, to Fortune 500 companies and startups." – Paul Klein

Step 3: Control the comparison

Always provide 3 pricing options, a **good**, a **better**, and a **best**.

With that framing, your customer isn't making a decision on whether or not they should work with you — they're making a decision on how they want to work with you.

Step 4: Anchor high

You want to set the expectation very high, early on.

You can even say an absurdly high ballpark number in the beginning, and studies have shown this actually doesn't hurt your chances of landing the project, Paul said.

But this isn't about manipulation — whatever you charge, you should always be delivering more value to the customer.

The Ultimate Guide to Acquiring & Managing a Remote Team

CONTACT INFORMATION

🌐 Joshua Chin's Official Website

in Joshua Chin's LinkedIn Page

▶ Joshua Chin's YouTube Channel

PERSONAL MISSION STATEMENT

I gain the most enjoyment and satisfaction when I know I've made a person's life just a little happier than it was previously.

BEST RESOURCES

🔗 Rework, from the team at Basecamp

🔗 ClickUp

Joshua Chin

CEO & Co-founder of Chronos Agency, one of the leading eCommerce email marketing agencies. They increase the ROI of email marketing campaigns by 20 -30% for eCommerce brands.

As your business begins to scale, managing and acquiring remote teams can become increasingly difficult.

Joshua Chin knows — his company, Chronos Agency, grew from side hustle to 60 employees in 2 years, spread across multiple countries.

Problem A: Hiring a scaling team within a remote environment

As Chronos began to scale, Joshua knew he had to move beyond trading his time for money and start to leverage systems and teams.

He wanted to find a way to build the ideal internal engine that allowed the founders/owners to step away and work on the strategy and long term growth. He didn't want to be stuck to the tactical operations, so he set out to discover the ideal agency or business structure.
Here's what he discovered:

> *"Talent acquisition in a remote environment is similar to digital marketing." – Joshua Chin*

You'll hear the same words as you'd hear from any digital marketer when you talk to Joshua Chin about talent acquisition and management: *"It's similar to digital marketing because it's all about conversions and attraction, and retention."*

Whether an employee is in a remote environment or a physical office, they have the same problems and needs. There are differences — and, to Joshua, one of the biggest differences is positive for remote teams:

"

"Your talent pool expands significantly when you aren't tied to geography." – Joshua Chin

Joshua took his talent acquisition search outside of his country, Singapore, and here's what he found out about acquiring high-performing remote employees:

1: Narrow your search

Narrow down your employee search to the key regions or geographies you want to hire from (perhaps language or time zone barriers limit your search).

Then, find the key job portals within those regions.

2: Tailor your acquisition process to your culture

Understand your company's strengths — maybe you're a startup, maybe you allow for more risk, maybe your team is highly structured, etc.

Tailor your talent acquisition to suit who you are looking for, and consider how the process looks to potential candidates. From there, it's all about sourcing and gaining traffic. (Notice how this is similar to marketing?)
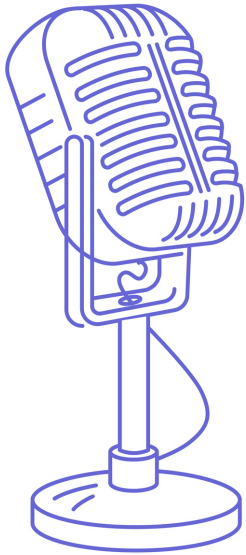
These are the tools Joshua found especially helpful when building his remote team:

- Friending people on social media
- Facebook groups
- Traditional job portals
- LinkedIn

3: Filter candidates

Joshua's team uses videos, assessments, and manager-level interviews, all before a candidate even reaches an interview with the business owner. Once a candidate gets to the owner, that interview should be a cultural fit check.

Problem B: Managing a team in a remote environment

But of course, the acquisition is only 1 piece of the remote employee puzzle.

You also have to manage remote teams.

Joshua has a 3-step process on how to effectively accomplish this.

1: Manage KPIs when hiring a remote team

Here's what Joshua has found with managing a remote team.

> *"Managing a remote team is, actually more freeing for entrepreneurs — because it enables them to manage objectives & KPIs." – Joshua Chin*

When you can't manage employees at your physical location, it's often freeing for the enterprise because they're no longer tempted to micromanage, when they come to work, or how they accomplish tasks. Within a remote environment, employers are somewhat constrained to managing KPIs or objectives.

2: Have a system + tools to track KPIs

Since you're probably managing your remote team based on KPIs, objectives, and goals, you need the tools to support that type of management. Just as with any other team, remote teams require communication and visibility.

At Chronos, they:

- Have weekly meetings, measuring deliverables and output of employees
- Use a tool called ClickUp

3: Physical meetups

Physical meetings are still very important in remote environments.

At Chronos, they have "workcations" twice a year, which include playtime, free time, and work meetings. Plus, they also have quarterly core team offsite meetings.

"A business is a machine, with different specialized, moving parts." – Joshua Chin

"The acquisition is only 1 piece of the remote employee puzzle. You also have to manage remote teams." – Joshua Chin

Everything You Need to Know About Starting (or Joining) a Meeting Forum

CONTACT INFORMATION

🌐 Tom Krieglstein's Official Website

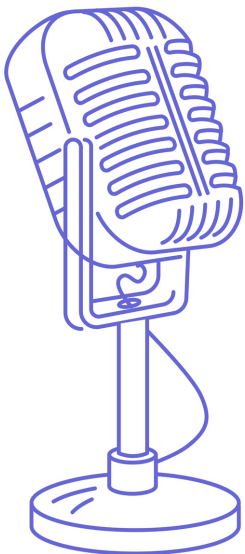in LinkedIn: Tom Krieglstein

🐦 Twitter: @tomkrieglstein

PERSONAL MISSION STATEMENT

World in which every human reaches their highest potential by connecting to a community of positive growth.

BEST RESOURCES

🔗 Wheel of Life

🔗 QLN, — a world-class speaking organization

Tom Krieglstein

Tom is a Global Keynote Speaker & Hugging Professional. Tom has trained over half a million leaders around the US and the world. Book Tom for your next training, keynote, or meeting.

Through his company, Swift Kick, they work with passionate leaders and their teams to create a vibrant company culture where every employee is highly engaged by being motivated by their work, valued by their employers, and connected to each other.

Perhaps you've thought about joining a forum or a mastermind group before, or maybe you've even considered starting one.

Tom Krieglstein, who just launched his 33rd forum, shares an important local resource for every entrepreneur who has the problem of working in echo chambers or lacking support from peers. Tom shares everything they would need to know about starting or joining a meeting forum or mastermind group.

So, why create or join a forum?

A big problem these days is that many entrepreneurs often operate in a siloed echo chamber. In the news, entrepreneurial mental health and wellness is a growing concern and trending topic in Silicon Valley and at Venture Capital firms. So much so, that remote mental health services for entrepreneurs was the catalyst for the hot startup Ginger.io.

> 〃
>
> *"I fell in love with the forum experience, & the concept. It made me realize that people learn best in circles versus rows." – Tom Krieglstein*

But besides digital services, how can entrepreneurs find and/or build a support system within their local communities? Enter the forum.

A forum is a group of 6 to 8 people who meet monthly and do a reflection on the prior 30 days, while also planning for the next 30 days. They focus on 3 big areas:

- Personal
- Family
- Business/career
- Possible 4th category: Friends/community

"A forum is a safe space — everything spoken within the forum is 100% confidential — so people can share everything they need to share." – Tom Krieglstein

How Tom structures forums

After helping start 33 forums, Tom's the pro to ask about how to structure a forum. Here's what he said:

- **Confidentiality:** Ensure everything spoken is confidential.

- **Very structured:** Meetings usually last 3-4 hours once a month, because members should be going through many topics within that meeting (think of a board meeting). So, keep them structured.

- **Accountability:** Members should hold each other accountable to their goals.

- **Annual retreat:** Once a year have a retreat, whether it's a virtual forum or a physical forum.

- **People cycle in and out:** Sometimes people will be in a forum for a decade or more, sometimes after a couple of quarters they move on.

- **Price of a forum:** If you are joining a group like EO New York, you may have fees associated with that organization. But otherwise, the only real cost is the dinner that happens afterward and the yearly retreats. (Tom said they usually put in $300 to $400 per quarter for the dinners, and around $2-3k for a multi-day retreat, or $1k for a one-day retreat.)

How a monthly meeting is conducted

The first part of a meeting is usually update-related, which includes goals and checking in. Then, there is a break after which there is some sort of presentation where someone's in the hot seat (meaning they discuss a personal topic they are working through). Alternatively to the "hot seat," you can bring in an outside expert.

There may be a second hot seat or a second presentation, and sometimes there are "business deep dives," where everyone brings their balance sheets or other business documentation, and the group works through issues together.

Break down yearly goals into quarterly actions

Tom's group uses the Wheel of Life, and each forum member rates themselves, and determines what they want to accomplish within a year.

Then, each member lists the actions they need to accomplish that quarter to ultimately achieve their yearly goals. They will check in with each other each month to see how they're doing on those actions.

- The moderator
- The goals keeper
- The special events coordinator (in case you have a special guest coming in)
- The retreats coordinator
- The parking lot attendant

T**he idea of the parking lot:**

When a forum member tells the group, *"I need to go to the gym more,"* or *"I may not make payroll this month,"* those statements all go into a document called the **"parking lot,"** managed by the attendant.

The attendant then asks the member how important that issue is to them, and when they would like to address it further with the forum in the *"hot seat."*

The parking lot attendant then directs the flow of *"hot seat"* members during the forum.

> "The wisdom is often in the crowd, not in the individual." – Tom Krieglstein

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The speaker actually became Tom's mentor, and Tom tried to start speaking on his own. But, in his own words...

"I failed miserably."

However, that didn't stop Tom — he decided to be trained under a program called QLN, — a world-class speaking organization. Tom became a lead facilitator for QLN for 2 years training leaders all over the world on public speaking.

Finally, he went to do public speaking himself, this time with tremendous success.

How to Scale the Unscalable

CONTACT INFORMATION
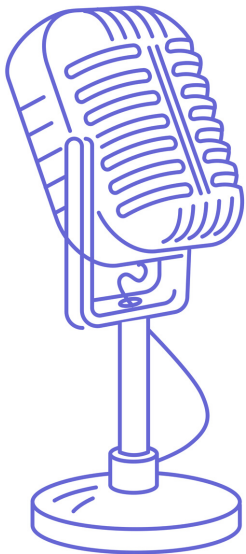
🌐 Tim Richardson's Official Website

in LinkedIn: Tim Richardson

📷 Instagram: @yourbasketisempty

🎙 Tim's Podcast: Your Basket Is Empty

PERSONAL MISSION STATEMENT

Play hard, but fair.

BEST RESOURCES

🔗 Traction: Get a Grip on Your Business

🔗 Anything from Harvard Business Review

Tim Richardson

Commercial Director at We Make Websites. After a couple of years being a Head of Growth he helped scale the business from only a dozen to over 60 employees in a short period of time. Tim is passionate about all things entrepreneurial, E-commerce, design, and technology.

Scaling. It's an issue every growing business, and every entrepreneur will come up against. How do you do it?

That's exactly what Tim Richardson managed to do for We Make Websites — when he started working there in 2016, they had 12 employees. He was quickly promoted to Head of Growth, and, now, just 3 years later, they have 65 employees.

Problem: Scaling the unscalable

> "Pretending like there is a template path to high growth is irrational." – Tim Richardson

While many tout this idea, there is no true template that works to "10x your growth in 6 months" for every industry. That, simply, is a fallacy, and most entrepreneurs know that. Certainly, you may have extreme growth in a short amount of time, but the path to getting there is likely unique to your situation, and you'll have to certainly put in an exorbitant amount of work.

But that doesn't mean there aren't some tactics and strategies you can copy and absorb from the explosive growth of We Make Websites (I mean, truly, 5x-ing your team in 3 years is certainly what I would call "scale"!). Here's what Tim's learned about scale:

Step 1: Recognize the problem

First, We Make Websites sat down as a company and discussed: *"What do we want to do, and why do we want to do it?"*

They asked themselves what work they really wanted to do each day. They avoided grandioso vernacular like *"we want to save the world."*

Eventually, they boiled everything down to:

> "We want to be the #1 Shopify Plus agency in the world." – Tim Richardson

From there, they worked backwards. *"How are we going to become the #1 Shopify Plus agency in the world?"*

They realized that to get there, they would need to focus on their culture.

Step 2: Culture

So, We Make Websites took a deep dive into their company culture to determine the team's buy-in on the company culture, what their skill sets were, who they needed to hire and under what culture criteria, etc.

After understanding the culture they had, and the pieces they wanted to replicate, they were able to *hire that desired culture.*

Step 3: Hiring

> "Ultimately, we're a people business. Do people trust us? Do they like us?" – Tim Richardson

Since they now knew the culture they wanted to replicate, they could hire for that culture.

Again, here, they worked backwards. They peered 2-3 years out into the future and focused on the organizational structure they would need at that point — *"What frontline positions, what creative positions, what executive positions, HR, finance, etc. will we need in 2-3 years?"*

How to Build a Company and a Product Customers Want

Shahram Anver

Shahram Anver used to work for IBM and TripAdvisor before deciding to start his own business with wife, Ann. Together they built DataCue, which aims to help small companies use their data to improve their business.

CONTACT INFORMATION

🌐 [Shahram Anver's Official Website](#)

in [Shahram Anver's LinkedIn Page](#)

✉ shahram@datacue.co

PERSONAL MISSION STATEMENT

If you want to go fast, go alone. If you want to go far, go with someone else.

BEST RESOURCES

🔗 [Y Combinator (YC) YouTube channel](#)

🔗 [YC Startup School](#)

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"I don't think this process ever stopped. And I think when you stop, that's when you're in trouble because the moment when you can get somebody who cares enough about the problem, then they're just going to flood you with feedback and that's really what you want." – Shahram Anver

Shahram Anver is the CTO and co-founder of DataCue, a software solution that creates personalized experiences for your customers across your website and email.

Shahram and DataCue aim to improve conversion by 30% by showing each visitor to your website, the portion of the site that they are most interested in. This is the equivalent of going to a store and telling a clerk, "I'm looking for some jeans," and the clerk immediately takes you to the jeans department.
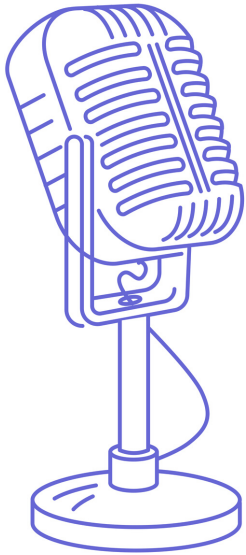
Essentially they are trying to make the website experience (which is virtually the same for every visitor) into the in-store experience, which is personalized. DataCue aims to help eCommerce entrepreneurs automate onsite conversion with minimum work required.

How would an entrepreneur go about starting a business?

Speaking strictly from a B2B perspective, Shahram says that one of the best advantages businesses have is that it can be difficult to get a meeting with someone, in order to get good feedback but once you do get that meeting, the feedback is on point.

Since Shahram and his business partner both came from consulting backgrounds, it seemed natural for them to have the idea of coming up with a more intelligent version of Google Analytics.

Should entrepreneurs consider hiring remote workers?

If your business is based around physical products, it is going to be more difficult to have you and the rest of your staff work remotely, from different sites. In cases like that, Shahram suggests building your company and products locally, making a name for yourself there, then expanding to other sites after you have built a good framework and a solid foundation of repeat customers.

When it comes to SaaS, we can't define ourselves by a local market. Shahram points out that there is no difference serving a Singaporean customer versus a Chilean customer or a Ukrainian customer.

Location doesn't matter when it comes to digital products. Instead of geographical boundaries, he defines their customers and market based on platforms.

"The cool thing about digital is that the whole definition of a market is changing quickly." – Shahram Anver

"If you have the opportunity of not being geography-bound, then absolutely, I think you should look outward." – Shahram Anver

Shahram suggests, if you are going to hire remote workers, why not go 100% remote? In his eyes, the people who work on-site have an unfair advantage of being able to access more tools or more information than that of the people who work remotely, and why give anyone on your team an unfair advantage over others?

The only caveat Shahram sees is the situation of needing local knowledge. If you have a product or service which needs local information based on one geographical location, then it is important to hire someone from that specific location.

For Shahram, that meant hiring someone from Chile because he needed local connections to make progress in terms of funding, early on in the development of DataCue.

"You just have to dive right in and get it done and figure it out." – Shahram Anver

datacue

The tools Shahram used to get to where they are today

Shahram and his business partner wanted to make a better, more intelligent version of Google Analytics and in the process, they didn't actually use Google Analytics. Perhaps it was Shahram's engineering background which led them to build their own version, their own way. They used Google Analytics as an example of what to do (but also what not to do) when they built their own javascript library, got the data collection to work, and built the algorithm themselves.

Because of that, they used many "low level" tools instead of commercial products. However, Shahram did utilize a service called Webflow which helps their customers build websites that is completely visual.

Webflow was helpful for Shahram because he was focused on building sites and coding for his clients, he didn't have the time to code his own site which marketed his product. Webflow allowed Shahram's designer to build the site herself, which freed up his time so he could better develop their product.

Shahram's Entrepreneurial Mindset

Shahram tends to be a more positive optimistic person. He is also in a unique situation since his co-founder is his wife and is a much different thinker. Because of their differences, they are able to prop each other up in times of hardship.

He is a big proponent of having a business partner, which is why he offered this Chinese proverb for guidance:

> "If you want to go fast, go alone. If you want to go far, go with someone else." – Shahram Anver

Of course, finding that balance between personal and professional is important when it comes to being business partners with your significant other. Shahram had heard from potential investors that having a business partner that you are married to is a big red flag.

This is why Shahram suggests having strict rules and serious discussions about boundaries when it comes to going into business with your significant other.

How To Build a Business with Agencies

CONTACT INFORMATION

🌐 John Crestani's Official Website

▶ John Crestani's YouTube Channel

✉ contactsupport@johncrestani.com

✉ john@johncrestani.com

PERSONAL MISSION STATEMENT

I guess it would be '**think big**'.

BEST RESOURCES

🔗 "The Millionaire Fastlane: Crack the Code to Wealth and Live Rich for a Lifetime" by MJ Demarco.

🔗 "Amazon Empire: The Rise and Reign of Jeff Bezos" - PBS Documentary

John Crestani

John currently owns and works at his training company, which specializes in training people who want to work for themselves at home. He teaches them how to work with affiliate marketing, which is basically commission-based marketing.

John is the founder of the Super Affiliate System, a blueprint that helps you start your home-based affiliate marketing business. John has made a promise to himself, that he is determined not to hire any employees while continuing to double his business.

The Super Affiliate System was the answer to John's question of, *"How can I play to my strengths (marketing) and love what I do every day?"*

Problem: I'm bad at management? How do I run a business that has no employees?

John learned early in his entrepreneurial career, that he is not fond of managing employees. Between the years of 2012 and 2017, he hired and fired dozens of employees. In order to neutralize the weak points within his business, John decided to stop hiring new employees.

After a somewhat tumultuous fiscal year in 2017, he boiled down all of his strategies in order to focus on the basics. He played to his strengths and took away from his weaknesses. When he took a good hard look at what his weaknesses were, the steps he needed to take were obvious to him:

- Don't hire employees.
- Don't have an office-based operation.
- Run the company virtually.

For some companies, this may be more difficult than not. John's business has always straddled between technology.
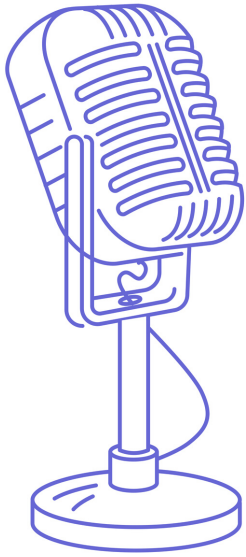
What steps did John take to starting and maintaining this business?

After realizing what he needed to do in order to run a successful business for himself, he looked for the tools needed to do so. While he wasn't hiring employees, that didn't mean that he wasn't hiring at all. His next option was to ponder over contractors but this led to another epiphany: contractor agencies.

> *"I can really rely on hiring agencies." – John Crestani*

When it comes to hiring agencies, John treats the process the same, as if he was to hire an employee. He has specific criteria for which he addresses during his numerous interviews. As for the criteria he formulated, they were multiple-fold. For each role he is looking to fill (software, support, sales, everything), he uses these criteria:

- He only looks for agencies that have experience in his niche (marketing).
- The agency must have (currently or in the past) worked with a competitor who is at, least, twice as big as his business.
- They must also be able to host his landing pages for his company and be able to modify or work with those landing pages because of the amount of importance he places on funnels.
- Another criterion is that the agency's fees must be $5000 a month or lower, with no longer than a three-month commitment to start.

Are there tools, sites, or referrals that John has for burgeoning or curious entrepreneurs?

John's first suggestion is to network with your competitors or other people in your market. He also suggests you look for connections and agencies at conferences. His last suggestion is to look in mastermind groups. Of those three, he prefers the mastermind groups the most.

Remember that you run your own business and you can play to your strengths as well. If there is a part of your business that you consider is your weakness or that you don't want to do, you can find an agency to fill that role.

John believes that everything, no matter how small or trivial, can be the seed of a much bigger idea. He encourages everyone to think about the grand vision of their tiny seed idea. *"What can it lead to? What are your biggest aspirations for this small thing?"*

> *"We kind of straddle the tech space and in the tech space (because we use the internet and technology) we just have a business model that opens itself up to very high margins." – John Crestani*

> *"You should desire to make an impact in any thought that you have, any positive you have to help somebody." – John Crestani*

How to Operate Remotely During an Emergency

Liam Martin

According to the Time Doctor website, "Liam is from Montreal, Canada and enjoys swimming with mermaids, seriously." He runs Time Doctor with co-founder Rob Rawson.

CONTACT INFORMATION

🌐 Liam Martin's Official Website

▶ Liam Martin's YouTube Channel

🐦 Twitter: @vtamethodman

📷 Instagram: @liamremote

f Running Remote Facebook Group

PERSONAL MISSION STATEMENT

Empowering people to be able to work whenever they want, wherever they want.

BEST RESOURCES

🔗 The Five-Minute Journal

🔗 Bose SoundTrue Ultra Earbuds

🔗 1Password

🔗 Speedtest.net

🔗 Google Apps for Business

🔗 Slack

🔗 Twist.com

🔗 Skype or Zoom

🔗 Asana, Trello, Basecamp as great programs to help communicate information to your team

🔗 ViewSonic VX32

🔗 Logitech MX Master 3

Problem: How do you get your team to work remotely during an emergency situation, like this?

Liam has had to refocus his efforts on making sure everyone has the ability to work remotely during this weird time. While things are chaotic now, he is sure that we can get through all of this together.

Like everyone else, Liam, his cofounder Rob, and Time Doctor have lost funds and have had to readjust their events and lives due to what is currently happening. Conferences have had to be canceled, rescheduled, and altered.

In fact, Time Doctor is now leading an online event called, "Remote Aid" in lieu of the in-person conference which was planned in April.

Adjustments need to be made (for individuals as well as businesses) and that is one way that Time Doctor can help you.

What steps do you have to do to get your team working remotely during an emergency situation?

Liam insists that the framework is pretty simple. Whenever you look at disaster mitigation, focus on three things:

- *What am I going to do today?*
- *What am I going to do next week?*
- *What am I going to do next month?*

These three things do not need to be taken care of right now; what does need to happen are a few small steps. Fundamentally, what needs to be taken care of sooner rather than later are:

1. Do a financial assessment

- Take a look at your office leases. If your office lease is going to renew in the next three months, you may come to the conclusion that you might not have needed this expensive cost. This is often, upwards of 30% of a business' budget. You may find that you can cut this, instead of cutting your staff/employees.

- Tools. Employ the right people, get the right processes in place, then place the right tools in order to accelerate that process.

> *"If you're a business owner right now, you need to be able to look at your business and figure out, 'What can I cut to keep this business functional?'" – Liam Martin*

2. Build your process documentation.

You need to get as strong as humanely possible in the next few weeks, in order to weather the storm ahead. Audit all of your processes. Create process redundancies when able. The largest remote process document in existence is also a great tool for any business and you can find it on GitLab.

Dimitri, the head of GitLab, encourages people to steal the document and use it as a basis for your own.

3. Communication is so important

In remote teams, communication needs to be scheduled, documented, and there needs to be clear outcomes from it.

- Synchronous versus asynchronous communication styles.

> *"You need to get as strong as humanely possible in the next few weeks, in order to weather the storm ahead." – Liam Martin*

> *"You need to discover the history of the processes because the history of the process may be really stupid." – Liam Martin*

> *"What you need of your team is to be relaxed so they can operate at peak efficiency." – Liam Martin*

- You also need to have a hierarchy of communication. For Liam, he rates in-person interaction at highest. After that comes video, then video beats audio, then instant messaging, then email. As you move up the hierarchy, you become more synchronous, as you move lower down the hierarchy, you become more asynchronous.

- As much as possible, getting people on video is important to see where your team's heads are at. Being focused during these meetings is essential. Sometimes that means playing games to keep your team's heads in the game. Sometimes that means setting guidelines and rules (like always having both video and audio on during Zoom meetings).

4. Metrics and Mental health

Check-in with your team on a regular basis, not just about the metrics of the company but also to see where everyone's head is at.

The whole world is trying to function at a high level of anxiety right now. Look at what you can do to reduce the anxiety level of your team.

What you need of your team is to be relaxed so they can operate at peak efficiency. Liam and his team uses The Five-Minute Journal religiously as a way to check-in with themselves and with one another.

What are some of resources Liam suggests?

Liam suggests that business owners start off with a great headset with a great quality microphone. Focus on microphone quality instead of audio quality.

Liam also uses and endorses 1Password, which makes password management for a fluid, unstable, or any batch of remote workers easy.

Speedtest.net is another tool, which can help guarantee that your remote workers are working with good tools at their own homes.

Google Apps for Business which can ensure that your files are accessible and that everyone is using the same programs.

Liam emphasizes the importance of communication, which is why instant messaging programs like Slack are so important. He suggests Skype or Zoom for video communication.

For project management, Liam lists Asana, Trello, Basecamp as great programs to help communicate information to your team.

He encourages the use of a good time tracker as well, to help make the transition easier as well as heightening productivity in your team's altered environment, which is what Time Doctor does.

"Just because you're looking at a computer screen, doesn't mean you're not communicating with real human beings." – Liam Martin

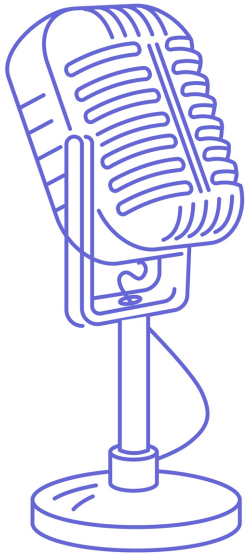### CHECK OUT THE PODCAST

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"In remote teams, communication needs to be scheduled, documented, and there needs to be clear outcomes from it." – Liam Martin

How To Scale Your Business If You Are Completely Remote

CONTACT INFORMATION

🌐 GQ Fu's Official Website

in LinkedIn: GQ Fu

✉ gp@ltvplus.com

BEST RESOURCES

🔗 EOS system (the entrepreneurial operating system)

🔗 TimeDoctor

🔗 HubStaff

🔗 Slack

🔗 Bitrix24

🔗 GoogleChat

GQ Fu

GQ is a co-founder of LTVplus whose mission is to rid the world of horrible customer service experiences. They build outsourced customer teams who have the experience and expertise to help their clients skyrocket their businesses into even more success. The remote work contractors that LTVplus pairs with their clients bridge language and time zone needs.

What is Customer Success?

At the core, this business doesn't focus on your success but rather, your desire to make sure that your customers are successful. Your success in this field is dependant on that. Customer success entails different things depending on what kind of services or products the customer or client offers.

For LTVplus, GQ knows that they are successful in focusing on their client's success, if they can do at least one of two things for their clients:

1. Their clients' sales increase
2. LTVplus can increase their client's customer satisfaction ratings

In order to determine what they need to do for their clients, GQ asks them one question, right off the bat:

> 🗩🗩
>
> *"What does success look like to you?"* – GQ Fu

Knowing the answer to this question will determine what they can do for their clients.

ABOUT GQ FU'S BACKGROUND AND LTVPLUS

Together with partners David and Mark, GQ has been running LTVplus for two years. He was lucky enough to have found his passion after landing a job in customer success prior to LTVplus.

How do you scale your business if you are completely remote?

GQ says the first step is to understand what the core positions or the core roles in your business are. Because there are so many options with remote workers, you need to narrow down the candidates based on what you need from them:

- *What time zone do you work in?*
- *What language(s) do you want these remote workers to speak?*
- *What positions do you want to fill?*
- *What skills do you need them to have?*
- *Do you have a client-facing role you need to fill?*
- *Do you need 24-hour coverage?*
- *What is your budget for remote workers?*

With LTVplus, GQ has partners and team members based in Turkey, Portugal, LA, Serbia, and the Philippines.

How do you find the right people for these roles?

GQ suggests understanding exactly what type of business you are running and who the key essential roles you need to fill the first time around.

For example, when LTVplus begins the recruiting process for themselves, GQ and his partners first assess that, since they are an outsourcing company (the type of business they run), they will need an operations manager (the essential role to fill) to help with processes and to help run and recruit some of the operations.

Since these processes are at the core of their business, filling that role can allow the ops manager to help grow their business.

> "Write down your mission and core values. These act as your compass when you're driving your business." – GQ Fu

It is also important to hire people who embody your core values to ensure that everyone is on the right page when it comes to your company's mission and goals.

You want to make sure that your team builds and grows the culture you want within your company.

LTVplus

How to get over the fear of hiring online?

There is a lot of trust involved when hiring someone who is working remotely, especially if you are a new business owner and haven't hired anyone before.

GQ suggests you take a moment to really understand what the recruitment process is like and put in the time to interview enough candidates.

GQ also encourages you to set a probationary period with your new workers to ensure that you both know what the expectations are, and so you can both work together to earn each other's trust, as well as learn about your work ethics and build a healthy work relationship.

Finding people with experience with remote work can also help with the anxiety of hiring someone you've never physically met.

"It is also important to hire people who embody your core values to ensure that everyone is on the right page when it comes to your company's mission and goals." – GQ Fu

"The technical aspect of it is so crucial that some people might have a tendency to forget [about it]." – GQ Fu

What are healthy expectations for someone working remotely?

Ensuring that your remote staff has the necessary hardware to get the job done, is one of the most basic and often forgotten about expectations.

In addition to the components they will need for the tasks at hand, they should also have a working mic and/or webcam for meetings.

Having a webcam is best to be able to connect with your staff, since everyone is working so far away from one another.

"You want to build that rapport as best as you can." – GQ Fu

Building and maintaining that connection and rapport is important.

GQ urges you to set boundaries for yourself as a business owner (and for the staff). What tends to happen is that people who work from home, might have a tendency of working longer hours and they shouldn't be expected to work more than necessary.

"You have to overcommunicate excessively in a remote set-up." – GQ Fu

Setting those work-hour boundaries and expectations ahead of time can eliminate this problem for both you and your staff.

Tools and Methodologies to Maximize Your Utilization of Your Remote Team

In order to make the most of your (and your staff's) time and money, GQ suggests you have a list of fall-back tasks. It is up to you to decide what your staff should be doing beforehand.

You also need to make sure you know what you are hiring people for. If you want to hire someone who is both a thinker and a go-getter, make sure your candidate has both of those characteristics.

At an entry-level position, you need to make sure you are clear with your expectations and your tasks.

GQ ensures that there are plenty of tools out there that serve as time managers to ensure that your staff is working.

A couple he suggests are TimeDoctor, or HubStaff. These time monitors and managers aren't just for business owners to see that their staff is working when they should be. These managers are also there for business owners to see which tasks are taking too long and why.

Depending on the field, these time monitors aren't too overbearing or creepy. If remote workers are experienced, they have probably worked with software like this before.

How do you manage your remote team?

LTVplus started out with the EOS system (the entrepreneurial operating system). This system (and the modified version that GQ works with now) employs:

- *Goal-setting techniques*
- *Weekly meetings to check-in with everyone (Level 10 Meetings)*
- *Good News and Gratitude minutes (to set and lift the mood)*

In addition to chat tools (like Slack, Bitrix24, or GoogleChat), try to do things visually. Send a video instead of just an image or an email.

GQ also suggests having interactive communications: ask interesting questions, give shoutouts, ask your team about themselves, etc. This helps you create a strong culture, which is so crucial to driving your business forward.

Overcommunication is important to management solutions as well. This should go both ways, from the business owner to his or her staff and vice versa.

> *"Ensuring that your remote staff has the necessary hardware to get the job done, is one of the most basic and often forgotten about expectations." – GQ Fu*

> *"At an entry-level position, you need to make sure you are clear with your expectations and your tasks." – GQ Fu*

How to Make Sure Your Web Development Process is On Track

CONTACT INFORMATION

🌐 Peter Mesarec's Official Website

🌐 Time4Marketing Official Website

🐦 Twitter: @Time4marketingP

🎤 Stitcher: Time for Marketing

📘 Facebook Group

in LinkedIn: Peter Mesarec

PERSONAL MISSION STATEMENT

With all of the muddy waters in the world of SEO and web development, Peter places an emphasis on being sincere and honest with his clients.

Being honest with people from the start is a great way to start any professional relationship. SEO is already a tough product to sell since clients and customers won't see immediate results.

BEST RESOURCES

🔗 Baymard Institute

Peter Mesarec

Peter is a keynote speaker, podcast host, SEO/Marketing Consultant at Seos.si, and an airline enthusiast. He has more than 10 years of work experience in and with SEO, conversion rate optimization, e-mail marketing, Google Adwords, Facebook advertising, and content marketing.

His latest project is a marketing podcast called Time4Marketing. Currently, his podcast is on hiatus but there are a number of back episodes to listen to in the interim.

Peter Mesarec is an experienced marketing consultant and an SEO expert at Seos.si. He is also a fellow podcaster, with a show called Time for Marketing. Peter is passionate about SEO and has over 10 years of experience in the field.

His professional journey started when his brother opened an online shop. In order to solve their issue of no traffic and no sales, Peter dove headfirst into the SEO market to rescue their fledgling e-commerce store.

Problem: How do you determine your website's performance?

In SEO and marketing, one of the biggest problems is companies spending a lot of money on redesigning and creating new websites. Afterward, they are unsatisfied with their results. They don't have the tools they need in order to make the adjustments they want. So they have to go through the entire expensive process all over again.

To make matters worse, there are web development companies out there who aren't doing what they are supposed to do. While they can make your website beautiful, they will often neglect certain important aspects of having a website: product descriptions, placement, and SEO copy which will bring in visitors.

> *"If you have a good enough foundation, you will have great cohesion and you will be able to test your website accurately and with useful results." – Peter Mesarec*

> *"While some web developers will tell you that they can bring you better SEO results and faster loading times, that emphasis may be a bit misplaced." – Peter Mesarec*

> *"You can't really make your SEO ranking better, but you can certainly make it worse if you make the wrong move or make multiple SEO mistakes on your website." – Peter Mesarec*

Unfortunately, companies and clients, who are looking to have their websites designed for them, don't often know what to look for or what has gone wrong when their websites aren't performing the way they expect or need.

What are some of the tools or the framework Peter uses to resolve this problem?

There are two things that need to be done:

1. Think about your website, client needs, and products
2. Use the specific KPIs (key performance indicators) for different parts of your website

The latter of the two is a neglected, but more valuable part of the whole process. It is Peter's opinion that while some web developers will tell you that they can bring you better SEO results and faster loading times, that emphasis may be a bit misplaced.

Which KPIs and metrics should we look for?

Peter highlights six different types or groups of metrics we should look at when we delve into website KPIs:

- *Google Analytics metrics*
- *SEO metrics*
- *Advertising metrics*
- *Product metrics*
- *Company metrics*
- *Subjective metrics*

He thinks that there is too much emphasis placed on KPI metrics outside of these six categories. Diamond and Bounce Rates metrics aren't going to help you by themselves or if you don't put them in the right context.

Peter also adds that you can't really make your SEO ranking better, but you can certainly make it worse if you make the wrong move or make multiple SEO mistakes on your website. When Peter talks about subjective metrics, he specifically means for you to look and listen to what your visitors are saying.

> *"Listen to the person that is using the webpage. How many curse words per day is he or she going to say?" – Peter Mesarec*
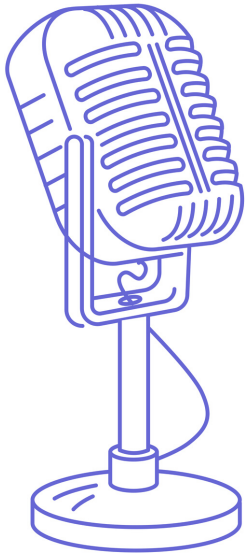
Which parts of your website are you proud of? Which would you show off to a loved one or to impress your friends or clients? If you say, "Nothing," then there is something wrong with the subjective metrics of your site.

What steps should you take when starting a website from scratch?

Peter suggests these six steps for starting a website from scratch, whether it is your first site or if you're scrapping your current website and starting over again.

1. *Planning*
2. *Wireframes*
3. *Graphics*
4. *Technical Optimization (SEO)*
5. *On-Site Optimization (creating the best content for your website)*
6. *Testing*

Of course, during each of these steps, you should always be going back to your plan from the first step, to ensure you are on the right course.

Peter places an incredible amount of emphasis on the planning period because it is your foundation for your site. If you have a good enough foundation, you will have great cohesion and you will be able to test your website accurately and with useful results.

Make sure you conducting your testing wisely and effectively.

> *"Testing your website does not mean that three of the people that are a part of your company click around your website. That is looking at your website." – Peter Mesarec*

What are some websites Peter uses to stay up-to-date on the SEO world?

To those interested in web design, Peter suggests going to The Baymard Institute. They specifically provide their clients with over 49,000 hours of large-scale e-commerce UX research and also shows their clients how their UX performance stacks up against leading e-commerce sites.

They conduct specific testing on websites to come up with informative data to help their clients improve their web pages. They also offer a number of free tools and information on their website, including articles, benchmarks/UX case studies, and page designs.

> *"Unfortunately, companies and clients, who are looking to have their websites designed for them, don't often know what to look for or what has gone wrong when their websites aren't performing the way they expect or need." – Peter Mesarec*

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How to nail product category design and build a community

BEST RESOURCES

🔗 The Messenger is The Message: How to Mobilize Customers and Unleash the Power of Advocate Marketing by Mark Organ

🔗 Building Your Brand Through Employee And Customer Advocacy

🔗 Category Creation: How to Build a Brand that Customers, Employees, and Investors Will Love by Anthony Kennada
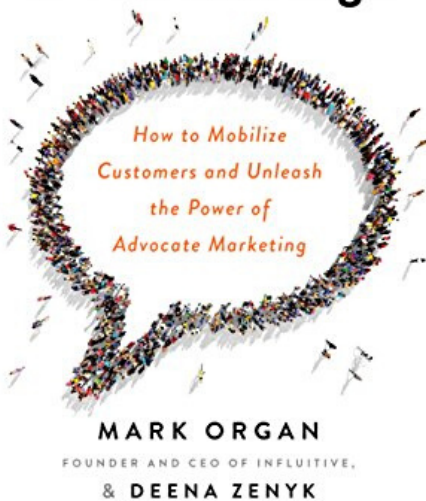
Mark Organ

Mark Organ is the founder and CEO of Influitive, helping companies mobilize their advocates to produce massive increases in referral leads, reference calls, social media participation and more.

Mark first revolutionized B2B marketing as the founding CEO of Eloqua (ELOQ), the world leader in marketing automation software, which was acquired for $871M. Mark has also helped over a dozen software companies successfully go to market in asymmetrical or disruptive ways as a consultant and entrepreneur.

What is Mark's approach to category creation and design?

To Mark, the term" category creation" is often mislabeled. He would rather refer to it as category discovery, in the same way that archaeologists discover ancient cities and relics, he and his team at Influitive discover categories and trends.

Mark first finds a group of people that he thinks will become powerful and numerous because of important trends that are happening in technology and society.

> "These were former engineers that were now tasked with generating repeatable demand using the internet and other digital channels. So we created this demand gen automated category." – Mark Organ

> *"What Apple understood was that there was a subset of people who wanted an ecosystem of different applications; they don't care how long it lasts." – Mark Organ*

> *"The names that stick are the names that you hear your customers using." – Mark Organ*

> *"Step three is to ask people what they really need, which leads to creating products and services that are truly powered by the people who believe in your beliefs." – Mark Organ*

What Mark does at Influitive is discover and introduce communities, and make them feel like they're safe and among like-minded people. He does this by:

- *Understanding the trends and technology*
- *Defining the people who benefit from this category*
- *Understanding these people in-depth*

> *"Understand their mental model and how they think, especially in terms of, not just their needs, but their attitudes." – Mark Organ*

Questions Mark uses to delve into the minds of Influitive's clients

In order to understand his clients (and their mental models) more, he uses a number of different questions to probe into their minds. A few of these questions include:

- *What is influential to you today that was off of your radar screen six months ago?*
- *What would cause you to do a lot more of this activity than you do today?*
- *What kind of environment are you looking for?*
- *If your company was an animal, what kind of animal would it be?*

What do your customers really want?

Mark raises the question, "How did Apple beat Blackberry?" During their first editions, Apple's battery life was incredibly low while Blackberry's battery could last days. Despite that, Mark admits to swapping from a Blackberry (which he loyally carried for 12 years) to an Apple. But why?
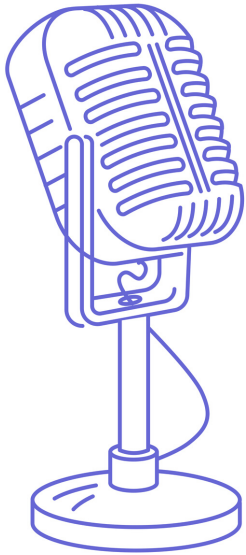
Because the criteria changed.

He rations that it was because Apple was solving for a different problem than Blackberry was. What Apple understood was that there was a subset of people who wanted an ecosystem of different applications; they don't care how long it lasts.

The lesson here is to learn about your market and community. This insight and proprietary insight into your community will give you a decisive advantage over your competitors. Your competitors might copy your surface features but they will not understand why you are building your products or services the way you do.

How steps do you take when discovering categories?

Step one is to start with the content for products. What Mark suggests is you create your manifesto. Even theologically and philosophically, leaders often start with some sort of manifesto: a bible, proclamations, or some sort of document which states the beliefs and reasoning behind your platform.

Step two is to create your community. Bring like-minded people together in order to discuss the topic and a better tomorrow. Mark suggests starting on a social media platform before moving to a proprietary platform.

Step three is to ask people what they really need, which leads to creating products and services that are truly powered by the people who believe in your beliefs.

> *"I think by writing your manifesto and by turbo-charging your community, I think you can build a powerful community around group coaching." –*
> *Mark Organ*

> *"Because you actually have the insight, it allows you to create something truly special and long-lasting." – Mark Organ*

How do you name your category?

The names that stick are the names that you hear your customers using. Do your research within your community and online. What phrases or words are people using to describe your community or what you're trying to do?

What are some resources that Mark suggests for community and category research?

Mark's book, The Messenger is The Message: How to Mobilize Customers and Unleash the Power of Advocate Marketing is a great resource for identifying your community.

He has also spoke in a few sessions for Salesforce.com including one titled, Building Your Brand Through Employee And Customer Advocacy.

He also suggests a book written by Anthony Kennada called, Category Creation: How to Build a Brand that Customers, Employees, and Investors Will Love.

CHECK OUT THE PODCAST

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> *"The lesson here is to learn about your market and community." – Mark Organ*

How to validate the need for your product or service

CONTACT INFORMATION

🌐 Mike Potter's Official Website

🐦 Twitter: @mikepotter

in LinkedIn: Mike Potter

PERSONAL MISSION STATEMENT

Mike and his team are really focused on building a great place where people want to work.

That is their number one goal in terms of building the company. Because of that, they've worked with some wonderful people and have found it to be a great way to spend their time: with people who they work well with.

Along those same lines, they also believe that having a work-home life balance is important and is one of the keys to their success.

BEST RESOURCES

🔗 Books by Basecamp

🔗 Tobi Lutke (the founder of Shopify)

Mike Potter

After a career in product management and product marketing and a year out of University, Mike decided to start his first company, which taught people how to use the internet. Since then he's worked in companies of various sizes from startups to Halogen Software. Rewind allows him to interact with great people, and work with all aspects of the business.

What is Rewind?

Rewind was founded in 2015 by Mike Potter and James Ciesielski. It is a service which protects data driving your business, from a simple side hustle to a successful venture.

Their focus is on backing up data which lives in the cloud – specifically in apps like Shopify, BigCommerce, and QuickBooks Online.

The benefits of giving it away for free ...at first

The one thing that Mike would share about his experience from starting Rewind is the benefit that they got from giving the product away for free at first. As a new company and in a market that was brand new to them, they needed to answer one specific question: is there a need for this product?

Their solution was found in allowing the product to be accessible to as many different people as possible and pricing it at "FREE" let them do just that. Once they were able to answer that question, they were able to answer other questions:

- *How much should we charge?*
- *What should we charge?*

"If you have a great product and if you provide great customer service, people will want to come back to work with you and they will pay you money for your product." – Mike Potter

"Referral program is a more tangible and meaningful way of tracking your customer satisfaction." – Mike Potter

Mike and James avoided push-back from customers by being honest from the beginning. When they first started, they mentioned their product wasn't going to be free forever.

It was a time-limited offer, though they didn't specify when they'd be charging for it.

While they expected to lose a few customers, there was a set of customers (customers that were making money from their own businesses and needed the security given by Rewind) who Mike was focused on. These customers were their target market.

"To validate the need, it's easier to get more people if price isn't a barrier." – Mike Potter

When they did move to a paid model, they made sure to give everyone two months' notice. After the two months were up, it was required that all of their customers transition to one of their paid plans.

Meanwhile, brand new customers (who joined after this paid model was set into place) were given a one-week free trial.

One of the biggest things that Mike and his business partner James has kept consistent is the need to both validate and learn from customers.

Mike's Key Tips for Building a Successful Business

Focus and always working on having great customer service.

If you have a great product and if you provide great customer service, people will want to come back to work with you and they will pay you money for your product.
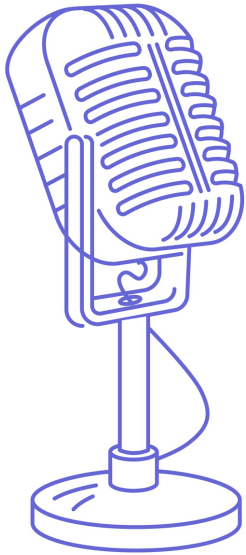
What are the other metrics that you track?

- *The time it takes to resolve cases*
- *Customers review the support interaction*
- *The number of reviews in the app store*
- *The rating of those reviews*
- *Are the number of purchases/installs growing?*
- *Why customers chose them over competitors*

What other surveys can businesses run (aside from post-support-interaction surveys)?

There are plenty of other surveys that businesses can send to their customers, but Mike is hesitant to send some of them out to their customers.

One of these surveys that Mike stays away from is an NPS (net promoter score, which measures the willingness of a customer to recommend a product or service) surveys.

In lieu of an NPS survey, Mike suggests starting a referral program. This is a more tangible and meaningful way of tracking your customer satisfaction.

How has the Shopify system changed since Mike started Rewind?

Shopify has certainly gotten bigger. There is also much more competition in the market.

"Early on (before we had a lot of revenue before we were putting a lot of money into marketing), that word-of-mouth, those reviews on the app stores (which created a super high ranking), that was all super important to us." – Mike Potter

What are some books and resources Mike recommends for listeners?

37signals/Basecamp has released a number of great books and resources for both burgeoning and experienced entrepreneurs who are looking to improve their management style and business practices.

Mike also follows what Tobi Lutke (the founder of Shopify) posts online.

"You can build a really successful company that grows really, really quickly (we're one of the fastest-growing companies in the city) but you don't have to kill yourselves and work all day and all night on it." – Mike Potter

"Focus and always working on having great customer service." – Mike Potter

How to Cater to Different Customers

Justin and Milana Atlan

Justin Atlan is an entrepreneur, consultant, and an adventurer from the Los Angeles area. Milana is an expert in online marketing, email marketing, and marketing strategy.

CONTACT INFORMATION

🌐 Clickbank University

in LinkedIn: Justin Atlan

f Facebook: Justin Atlan

📷 Instagram: @justinatlan

in LinkedIn: Milana (Kalimullova) Atlan

📷 Instagram: @milanahhh

PERSONAL MISSION STATEMENT

Collectively, their personal mission statement is to change education and outlets of education.

Milana wants to be able to have options for different types of education and to allow the flexibility to work with and for different types of students.

Justin sees each customer and student as a version of himself in the past and tries to focus on how to accelerate their path to financial freedom and success.

BEST RESOURCES

🔗 4-Hour Workweek by Tim Ferriss

🔗 GoToWebinar

Problem: How to service customers with different levels of experience using only one product?

Now, more than ever, education for digital marketing and digital businesses is important but not available through mainstream education. There are no digital marketing courses available through public schools.

The main problem that Justin and Milana have been running into is the diverse levels of experience and knowledge from their students and customers.

How do you teach, work, and cater to such a wide range of people with only one product?

The tools and services Justin and Milana work with to tackle the problem

They try to get to each customer's different level in order to not waste their time or their customer's time. In order to do this, they utilize live chat and webinars (which function as Q&A's in order to identify issues individually while allowing the community to listen live).

For their webinars, Justin and Milana turn to GoToWebinar. They chose GoToWebinar specifically because that has been their legacy platform.

CLICKBANK.

Because of that, the community recognizes it and works well with it.

GoToWebinar is set up with one-way communication so they can field the questions that most benefit the group, but can also message individual customers to answer questions that wouldn't be as helpful for the group as a whole.

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> *"We really just want to try to give as much value as possible." – Justin*

The steps Justin and Milana use to solve this problem

Justin and Milana have found that the key to reaching such a wide variety of students and customers is to allow for flexibility.

1. *Allow the customers to show how knowledgable they are*
2. *Give them the opportunity to take different paths depending on their level of knowledge*
3. *Have week-by-week plans for the beginners (Clickbank University's largest clientele)*

- Eight-week plans for affiliates
- Twelve-week plans for vendors

They have a "drip fed" -style program. The first three or four weeks of each path or plan is given to the customer at once. After that, they are given videos and information a little at a time (drop by drop).

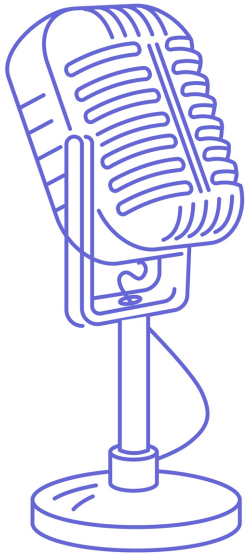They also have expert courses that are available to customers.

These are taught by experts in a specific niche (social media, or traffic generation), who teach mini-training courses for the community.

These courses are available through their Q&A webinars, which allows for communication between customers and the experts.

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> *"There are a lot of places in CBU (Clickbank University) where we cater all across the board." – Milana*

How Justin and Milana get their customers to take action

In order to avoid the trend of simply ingesting information and education without taking action, Justin and Milana tried to incentivize the initial action by entering customers into a giveaway when they showed up to their first class.

Businesses should be focused on **"selling after selling."**

The example Justin gives us is of a fictitious "Ab-Cruncher" workout tool. Hundreds of people might have bought one of these, but most of these Ab-Crunchers are just sitting in the garage.

Businesses need to ensure that people are using their products after they buy them.

> *"Businesses should be focused on "selling after selling.""* – *Justin and Milana Atlan*

The books, tools, and resources that affected the creation of Clickbank University

One of the things that helped Justin create Clickbank University was the idea of the 80/20 rule. As in, 20 percent of your hard work creates 80 percent of the results.

Another example of this philosophy is the 4-Hour Workweek.

Tim Ferriss (the author of the 4-Hour Workweek) suggests outsourcing the tasks you need not be working on yourself. This book also talks about process creation which allows you to scale.