

Well, hello there. I hope you are doing great today. I'm super excited to be here with you today and to talk about something that I get asked a lot from my clients and from people who are colleagues of mine, friends of mine that are entrepreneurs, it's all about what software do I use? What tools, what software do I use? What systems, that then align with the processes that I create in my business that allow me to connect with my team on a deeper level, as well as do what I need to do more effectively and efficiently, so that I can focus on serving my clients in an even deeper way, and do it in a way that I don't need to worry about what's going on behind the scenes?

So I wanted to give you some of my top, top, top tools that I use in my business. As I said, it is something that people ask me about a lot. I am the systems and processes queen. Never really realized I was that until over the past couple of years, because I just kind of figured this is what I've been teaching people for so long, and didn't really realize just how geeked out, how crazy I get about this stuff and I just geek out on it.

So anyway, so if you have a business and you're wondering what systems or software to use to help you grow your business, I'm going to give you my top favorites. And these, like I said, one of the big things that I focus on, is aligning whatever processes you create in your business, to create a better experience for your customers, a better environment for your employees, and even just to get things done so that you have more time. You want to make sure that those processes align with the software and systems that you use. If they don't, we run into a problem and you either have a process that's broken and not sustainable, or you have systems that are kind of a waste and you don't use them, and then you end up having to get a new system.

So we're going to start off, first one is Canva. Canva's been around for a while. I've used it for a long time. It is great. If you are not a graphic designer, if you have no graphic design training, it is great. And they've added so many things over the years and it syncs with a lot of stuff, which was awesome.

Now, I started out using it myself and I do have graphic design training with Photoshop and Illustrator and all the Adobe products. But now my virtual assistant uses it to help me to create graphics and presentations and things. It is phenomenal by far. And they give you all kinds of templates. And all you have to do is just, it's like plug and play. You just download pictures and drag and drop into these templates. It's phenomenal.

So the second one is Asana. And Asana is one of my absolute favorites. Asana started off being free, but I think now it's free for a couple of weeks, or at least a month, you get a trial period and then you have to pay for it. But it's really for what you get and how powerful it is, it is well, well worth it.

It helps you to connect, especially if, in today's day, a lot of people are working virtually, it helps to keep teams connected. It helps you to manage projects, things that you have going on in your business. It helps you to manage them better, as well as make sure everybody's on the same page, everybody knows what they need to do, and that everybody's getting it done in a timely fashion, so that your project can continue to move forward and you can get stuff done.

I've been using Asana for a really long time. There's many different kinds of software like this out there. There's Basecamp. There's Microsoft project. There's Trello. I mean, there's just so many. There's Monday. But I personally am a big fan of Asana. I think the learning curve on it is a lot shorter than some of the other ones. I also just like the visual representation and kind of where everything is and how they arrange things and the flexibility.

And over the years, again, they've made so many updates to how you can view a project, calendar, list, virtual sticky notes, I like to call them, or boards. It's just, it's so, so powerful. And it is one of the key things, like I said, if you have team members all over the place, even if you have a brick and mortar

business and you are busy, you have a lot of stuff going on, it is great because it keeps everything all in one place.

A lot of people try and communicate and do things via email. An email, it becomes white noise because we have so many things that are coming into our inboxes and it's just harder to keep track of everything. So Asana makes it super easy because it keeps everything in one spot. And it relates to the tasks that are in there, relate back to the project. So it keeps everything all together.

So if you ever have a question and this happens to us a lot, we have a question about what's happening with something, we can just go back to the project, back to that particular section of the project and see all the notes or all the information that goes with it. It's great.

Going along with that is another piece of software called Slack. And Slack's great. Slack and Asana talk to each other. They integrate, which is awesome. If you were familiar with the old, IM, I guess, instant messaging that you used to be able to do when it first came out. It's very similar to that, just much more advanced than what we had back in the 90s, and I'm dating myself; early 2000s. Back in the late 90s, I guess, early 2000s.

But Slack is great because again, you can create different channels. Okay. And you can link those channels to projects that you have in Asana, which is fabulous. It's really good for quick communication instead of sending an email. Because again, you can have it sorted and kind of contained to whatever that topic is. Okay. Instead of just sending threads of email back and forth, that ended up getting lost.

So Slack is awesome. Slack is free. I think there is a paid version of Slack, but you can use the free version and you're good to go. It does sync with a lot of other things. I think it syncs with Google Drive and it syncs with a lot of other different pieces of software and systems that you might be using. But again, I like it because it keeps things together and it also connects with Asana.

And the third thing that kind of goes along with all of that, and we use this for our digital workflow, our digital process for everything that we do, so that everybody knows kind of what's happening and where things are moving and where they are at all times. And we're all in different parts of the country and parts of the world. I mean, my podcast editor is in England. The rest of my team is in either Pennsylvania, California, Colorado. So it keeps everything all together and everybody knows where everything is and where they need to grab stuff, so that they can do whatever their part is.

So this piece of software that I like that goes with this is Dropbox. I've been using Dropbox, oh my gosh, since, oh my heavens, 2000. So what's that 21 years? From I guess, close to when it first came out or around then. And there's, again, they've made so many changes, so many upgrades. I have used Google Drive. I've used Box. I've used, I forgot the one that is from Microsoft, but I've used all of those different ones. And for me, I keep going back to Dropbox.

Sometimes when I work with clients, they prefer Google Drive, which is fine. But I am big on Dropbox because of the file structure, because of the security, and just because of different things that you can do with it with sharing information with team members. It's a great piece of software. It syncs, again, it syncs with a lot of different, whether you have a point of sale system, or you have some kind of system that you process orders for in your business, whether you're a law firm or a store or a restaurant or whatever, and you have these different point of sale systems. Dropbox syncs with it.

So if you need to pull files or you need to share files with clients or whatever you need to do, it's great, because again, it does have a lot of integration capabilities, which is why I love it so much. It also, again, it makes sharing files and if you have team members, you can create certain things with team members, certain groups with team members, so only certain team members can see certain files. It's awesome. And then if a team member leaves, it's easy to just revoke their access. So that's why I like Dropbox so much.

Another tool that we use in our business a lot, and it really makes for training people, I'm big on onboarding processes, making sure that you have a really strong onboarding process that gets people up to speed. They understand what their greater purpose is in the business, what the business' greater purpose is, as well as how to do things the way that you want them done. So that's part of infusing your brand into everything that you do.

But the piece of software that I use, particularly when I'm training people, and even when I'm working with clients, is Loom. And Loom is, I mean, if you're a Mac user you can use, I think it's called ScreenFlow. I'm not a Mac user, but I use Loom. And it's a great piece of software. And I even use it to record things for courses that I've created over the years. And it makes things so much easier.

Instead of typing up a message or sending an email or whatever, when you do a ScreenFlow for a process, and you want somebody to understand where to go, where to click, especially, I talked about our digital workflow between Asana, Slack, and Dropbox, with my remote team, Loom is great because I can, when I need somebody to do something or I need them to move files or switch something up, it's great. Because all I do is I just go in, you can choose whether or not to have your face showing in the bottom and your screen or just your screen, it's up to you. But it's great because I just record as I'm clicking as I'm moving through, I just record and away I go. It's great for again, if you are recording something for a course, or if you're recording something to send to a customer, if you're recording something to send to, like I said, an employee, a team member, works phenomenal.

Another piece of software that I love, Ubersuggest. if you're big into SEO and Google Analytics, Ubersuggest is a great tool, makes things a lot easier to look at keywords, or look at how your site is performing, or look at like the health of your site from an SEO perspective, so that you can improve it and get more people, drive more people to your website. So Ubersuggest is another one.

And the last piece, the last tool that I absolutely love, I mean, I have so many, but the last one that I absolutely love is Leadpages. That's what we use for all of our sales pages. I use it with my clients all the time, especially if you're running Facebook ads or you're running Google ads, you want to have a landing page that you can create your promotion on, you can create your sales page. If you have a product you want to highlight or a group of products, it works out phenomenal because you can create it on there.

Again, you get a bunch of different customizable templates. Drag and drop images in, put your text in. You get a link and you can use that in your ads. And Facebook loves it. Google loves it, because the experience when people actually land on that page, they are getting all the information that as long as your copy is congruent with your ad, but they're getting all the information that they need, related to whatever your ad is about. So I love that tool. I've been using it for a long time.

Again, all these systems, they just keep making updates to things and they just keep getting better. But again, even more important, all of the processes that I have in my business align with all of these different pieces of software that we use. There is not one piece of software, if I'm not using a piece of software, we get rid of it.

There have been several over the past couple of years that I mean, I love them, but I wasn't using them. So obviously they didn't align with the process that I had in place in my business, so I got rid of it. Because the last thing that you want to do is have software, either be paying for software that you're never going to use and then it's kind of a waste. Or, that you have software, you don't really understand how to use it. You don't really understand how to fit it into what you're doing. And maybe you're wasting your time doing stuff, instead of getting a piece of software that works so that you can have more time.

So, anyway, these are the tools I get asked this all the time, because I don't know. Somewhere along the line, like I said, I got to be the software queen. Maybe it's because my husband's a tech guy. But anyway,

these are the tools that I use. There are more, but I wanted to give you the top ones that I kind of cover a lot of bases for different types of businesses. But these are the ones that have really helped me to scale my business, as well as connect my team together in a better way, so that we can all be on the same page, be focused and get things done in a more timely and effective fashion.

So, anyway, I hope this helped you. A lot of these are free. If they're not free, the cost for them is so minimal when you're looking at it on a monthly basis. And like I said, I would highly, highly, highly suggest them, especially with the way that the world is moving and changes in the Google algorithms based on page experience, you want to make sure that you are doing what you can to stand out from everybody else. You are doing what you can to be found, and you're doing what you can to create a great experience for people that are following you and people that are going to be landing on your site, or are interested in buying from you, working with you, whatever that looks like.

So I hope this helped you. And for more, if you want to learn more about processes, how I teach them, why they're important, the different types of processes that you need in your business, please join me on Wednesday, tomorrow, for my free masterclass. Every month, I do a different masterclass on a different topic. And this one is all about how processes can actually help you to simplify your business, so you can amplify results, that you can increase your cashflow, attract better customers and create an environment for your employees that makes them absolutely love working there.

So, anyway, I hope you can join me for the masterclass on Wednesday. It is at 2:00 PM Eastern time. Make sure if you click the link in my bio or the link in this video, to register and save your seat. So until next time, I hope you have a great rest of your day and take care.