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Systems & Soul

The Essential Tools Every Creative Needs to Thrive

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You're a Visionary Creator

Your Strength

You envision beautiful products, perfect designs, and meaningful customer experiences.

The Challenge

Running the business side can feel overwhelming, disconnected, and not creative.

Even the best ideas need structure to thrive



Today's Roadmap

- Professional Website - Your Digital Home
- CRM - Never Lose a Customer Again
- Email Marketing - Stay Connected Consistently
- Financial Tools - Know Your Numbers

Four essential tools to build a thriving creative business



Professional Website

Your Digital Home



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Your Website: More Than Pretty Pictures

What It Does

- Showcases your work 24/7
- Builds credibility and trust with new customers
- Captures leads while you sleep
- Answers common questions automatically

What You Need

Platform: *Squarespace, Wix, Shopify, or WordPress*

Essential Pages: *Home, About, Portfolio/Shop, Contact*

Must-Have: *Mobile-friendly design*

Pro Tip: *Include clear calls-to-action*

Your website is often the first impression - make it count



CRM

Customer Relationship Management



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The Cost of Not Staying in Touch

Real Scenario

Sarah engraved 20 wedding gifts for a customer in June. The customer loved the work. But Sarah never followed up. That client hosted an anniversary party the next year and went to a competitor.

$500
Lost repeat business

3+
Lost referrals

0
Follow-up emails sent

Your past customers are your best source of future revenue



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What a CRM Actually Does

Track Every Customer

- Store contact info, order history, and preferences
- Set reminders to follow up at the right time
- Note important details for personalization
- See your entire customer relationship at a glance

Simple Options

Free: Excel, Google Sheets or Airtable
Start simple with spreadsheets

Easy: Hub Spot, Pipedrive
Purpose-built for small businesses

Advanced: Salesforce, Zoho
For scaling businesses

Start with something simple - even a spreadsheet beats nothing



Email Marketing

Stay Connected Consistently



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Email: Your Direct Line to Customers

Why Email Still Works

- You own your list (unlike social media)
- Reaches people where they already are
- Allows personalization and automation
- Drives sales with targeted campaigns

Getting Started

Top Platforms

Mailchimp, Constant Contact, ConvertKit, Flodesk

Email Ideas

Monthly newsletter, new product launches, seasonal promotions, behind-the-scenes content

Consistency beats perfection - send something regularly



Financial Tools

Know Your Numbers



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The Real Cost of That Custom Order

Common Mistake

You charge $50 for a personalized cutting board. Materials cost $20. You think you made $30 profit.

Actual Costs

Materials: $20

Your time (2 hrs × $25/hr): $50

Equipment wear: $3

Email/messages: $2

Total: $75

Reality Check

-$25

You lost money on this order

Track your time and true costs to price profitably



Simple Financial Tools That Work

Track Three Things

Income
Every payment that comes in

Expenses
Materials, tools, subscriptions, etc.

Time
Hours spent on each project

Tool Options

For Tracking
Wave, QuickBooks, FreshBooks, or a simple spreadsheet

For Pricing
Use a pricing calculator

Pro Tip
Review your numbers weekly, not just at tax time

Simple tracking prevents underpricing and cash flow surprises



Connecting Your System

How These Tools Work Together

Captures leads — Stores contacts — Nurtures relationships — Tracks profit

Start with ONE tool this week. Perfect it. Then add the next.

Systems give you freedom to focus on creativity



Your Next Steps

This Week

Choose ONE tool to implement. Use the checklist in your handout to get started.

This Month

Set up your foundation: Website OR CRM. Track your time on 5 projects using the worksheet.

This Quarter

Have all four tools working together. Review your systems monthly and adjust as needed.

Progress over perfection - take the first step today



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