Systems & Soul

The Essential Tools Toolkit

Your Complete Guide to Building Business Systems

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Quick Start Checklist

Use this checklist to track your progress as you implement each tool.

- [ ] **Professional Website**
  - Choose a platform (Squarespace, Wix, Shopify, WordPress)
  - Create Home, About, Portfolio/Shop, and Contact pages
  - Ensure mobile-friendly design
  - Add clear calls-to-action on each page
  - Test all forms and links

- [ ] **CRM System**
  - Select your CRM tool (Google Sheets, Airtable, HubSpot, etc.)
  - Set up customer contact database
  - Create fields for order history and preferences
  - Set up follow-up reminders
  - Import existing customer contacts

- [ ] **Email Marketing**
  - Choose email platform (Mailchimp, ConvertKit, Flodesk)
  - Set up welcome email sequence
  - Plan monthly newsletter content
  - Create email templates
  - Build your email list

- [ ] **Financial Tools**
  - Select tracking software (Wave, QuickBooks, FreshBooks)
  - Create income tracking system
  - Set up expense categories
  - Start time tracking for projects
  - Calculate true hourly rate using worksheet

Tool 1: Professional Website Guide

Essential Pages Checklist

Page	Must-Have Elements	Your Notes
Home	Clear headline about what you do Professional photos of your work Call-to-action button Brief introduction	
About	Your story and background Why you started your business Your unique approach Professional photo of you	
Portfolio/Shop	High-quality product photos Detailed descriptions Pricing information Purchasing/inquiry options	
Contact	Contact form Email address Social media links Response time expectations	

Action Step: Choose one platform this week and create a basic 4-page website.

Tool 2: CRM Contact Template

Use this template to structure your customer relationship management system.

Field Name	What to Track	Why It Matters
Contact Info	Name, Email, Phone, Address	Basic communication essentials
Order History	Date, Item, Amount, Notes	Track purchase patterns
Preferences	Colors, styles, occasions	Personalize future recommendations
Special Dates	Birthday, anniversary, holidays	Send timely reminders
Referral Source	How they found you	Understand marketing effectiveness
Follow-up Date	Next contact reminder	Never lose touch
Tags/Categories	Wedding, corporate, personal	Segment your audience
Notes	Important details, conversations	Build genuine relationships

Pro Tip: Start with a simple Google Sheet. You can always upgrade to dedicated CRM software later.

Tool 3: Email Campaign Planner

Plan your email marketing with this simple monthly template.

Monthly Email Ideas

Week	Email Type	Content Ideas	Your Plan
Week 1	Newsletter	Behind-the-scenes update New products/services Helpful tips	
Week 2	Featured Product	Spotlight one item Share customer story Special offer	
Week 3	Educational	How-to guide Care instructions Design inspiration	
Week 4	Engagement	Customer showcase Ask for feedback Announce events	

Email Writing Formula

Subject Line: Clear, specific, creates curiosity (40 characters or less)

Opening: Personal greeting, reference their last purchase or interest

Body: One main message, easy to scan, include images

Call-to-Action: Clear next step (Shop Now, Learn More, Reply)

Closing: Sign with your name, include social links

Tool 4: Pricing Calculator Worksheet

Calculate the true cost of your work to price profitably.

Step 1: Calculate Your True Hourly Rate

	Calculation	Amount
1	Desired annual income	$_____
2	Business expenses per year (materials, tools, software, etc.)	$_____
3	Total needed per year (add lines 1 + 2)	$_____
4	Billable hours per week (be realistic!)	_____
5	Billable weeks per year (52 minus vacation/sick time)	_____
6	Total billable hours per year (multiply lines 4 × 5)	_____
7	**Your hourly rate (divide line 3 by line 6)**	**$_____**

Step 2: Calculate Project Pricing

Cost Category	Amount	Notes
Materials	$_____	Include all supplies used
Your time (hours × hourly rate)	$_____	Track actual time spent
Equipment/tool usage	$_____	Depreciation, maintenance
Communication time	$_____	Emails, calls, meetings
Overhead (10-20% of above)	$_____	Utilities, rent, insurance
Total Cost	$_____	
Profit margin (20-50%)	**$_____**	**Industry standard: 30%**
Final Price to Customer	**$_____**	**This is your quote**

90-Day Implementation Plan

Follow this roadmap to build your business systems step by step.

Month	Focus	Action Steps	Success Metric
Month 1 Foundation	Website + CRM	Launch basic website Set up CRM database Add 20 contacts Send first follow-up email	■ Website live ■ 20+ contacts in CRM ■ First follow-up sent
Month 2 Connection	Email Marketing	Choose email platform Create welcome sequence Send first newsletter Track 5 projects with pricing worksheet	■ Email platform set up ■ 50+ email subscribers ■ 2 emails sent ■ 5 projects tracked
Month 3 Optimization	Financial Tools	Set up accounting software Review all pricing Analyze which projects are profitable Refine systems based on data	■ All income/expenses tracked ■ Pricing adjusted ■ Monthly review scheduled ■ Systems documented

Remember: Systems support your creativity. Start with one tool, master it, then add the next. Progress over perfection!