Angela Kelly Smith

Tools of the Trade: What Keeps My Business Running
The Marketing Chat Podcast ep. 052
Podcast Transcript

There are so many tools out there to run your business. It can get really overwhelming trying to decide what to use—especially when some of them don't offer free trials. How can you know if you're going to like it if you can't try it?

When I first started my business, I looked to other business owners whom I respected to see what they were using.

Now, it's still a matter of personal preference. For example, with websites, I was on Wordpress for years. But now I've been with Squarespace for 7 or 8 years and absolutely love it.

With bookkeeping software, I'm just not a finance person. So, I never got into QuickBooks. I've tried several other accounting programs and landed on something that best suits my style.

So, today I'm sharing some of my tools of the trade: Some pieces of software that I particularly love and just can't do business without! I'll share my recommendations for back office, website, digital course platform, email service provider, podcast hosting provider, video and audio editing, and visual design. It's a lot, but I'll move quickly while still giving you the essential details!

I'll be sharing links in the show notes. A few of them are affiliate links. Three links get you discounts. If you don't want to click on the links, just google them and navigate there on your own!

Let's start with the software that runs my entire back office. I am so glad that I found this online program. It is an absolute lifesaver. I stumbled across it on my own and have since run into other service providers who swear by it, too. I recommend it to anyone who asks for a back office recommendation.

And that is HoneyBook.

HoneyBook is an all-in-one system that handles everything I need for client management *and* bookkeeping. I use it to track income and expenses, scheduling, proposals, contracts, invoices, collecting payments, lead generation, sending files and forms to clients, and communicating with clients. You see how it really does everything!

Without HoneyBook, I'd need separate programs for each of these processes. I'd need a program for bookkeeping, another for scheduling, another for invoicing and payments, another for lead generation, another for files and forms, and another for communicating with clients.

So, HoneyBook does all of this in one platform, saving me tons of time and money.

Here's an example of a client process. A potential clients gets in touch through a HoneyBook contact form on my website. That creates a new project in HoneyBook. I can now communicate with that person right in the HoneyBook system. Or I can use email. But, if I do it through HoneyBook, all the communications will be saved in HoneyBook. You can still reply to those messages through your email, and HoneyBook saves them in their system.

Next, I send the potential client my HoneyBook scheduling link. HoneyBook is linked to my Zoom account. So, a Zoom meeting is automatically created. That appointment gets saved right in HoneyBook and to my calendar–in HoneyBook and in iCal.

We have our meeting, and maybe I send them a proposal, which I can do through HoneyBook. Or maybe they hire me on the spot. When they're ready to hire me, I have my contracts saved in HoneyBook. So, I send over the contract along with an invoice. They sign the contract through HoneyBook *and* pay the invoice. My Stripe account is integrated with HoneyBook. So, the money gets transferred to my bank account within a couple of days.

I use HoneyBook's forms to send an intake form to the client as soon as they pay the first invoice.

I can upload any other files I need to share with clients, such as the New Client Welcome Packet.

HoneyBook has you create a project management system for each type of workflow you have. So, I have one set up for website design. When I assign that workflow to a client, HoneyBook automatically processes that client through each stage depending on what I have the client do within the system. I still use Asana for my end of the project. But I use HoneyBook's system to remind me what to do with each client.

Again, the client and I communicate through HoneyBook's communication system. We can schedule more meetings as needed. While I don't charge by the hour, I can track my time in HoneyBook.

Since the client already paid me—either in full or a deposit—HoneyBook keeps track of that as income. I can input my expenses into the system. And HoneyBook will generate a profit-and-loss statement for me.

You can see that HoneyBook does all the things! I use the scheduling tool for students in the Women Podcasters Academy and for guests on this podcast.

I really can't recommend HoneyBook enough. When you use my link in the show notes, you get 50 percent off your first year with HoneyBook.

Let's move on to website hosting. So, if you follow me at all, you already know that I'm going to recommend Squarespace. Now, that comes with a caveat. If you have a huge budget and need significant customization with your own built-in digital-course platform, for example, you should go with Wordpress. I created my own Wordpress site with a digital-course platform in around 2015 because I wasn't happy with two other platforms I had tried.

But, if you're a small business, freelancer, or solo entrepreneur, Squarespace is an excellent choice.

First, you can create gorgeous websites in Squarespace. They have so many awesome pre-built templates to choose from.

Second, Squarespace is easy to use, and they have lots of tutorials to make it even easier. They also just upgraded their interface to what they call "Fluid Engine." This is their fancy term for "drag-and-drop."

So, you add blocks—that is, a text block or an image block, for example—to your page. Then you resize them and drag them to where you want them. You can overlap them and even add background color to your text boxes. All that is totally new to Squarespace. You used to have to use custom CSS codes to add background color to your text boxes. Y'all just about won't need me anymore to do your websites!

Third, everything in Squarespace is totally customizable. I've got tutorials on my blog to show you how to change the colors and the fonts. You can even upload a photo, and the system will pull out a color palette to use as your brand colors. You can tweak them, if they aren't perfect. It is awesome!

Fourth, Squarespace's customer service is fantastic. They reply quickly, and they always have an answer for you.

Squarespace has add-ons, such as their own scheduling system and email campaign system.

Now, Squarespace also has a membership site. But you're limited on how much video you can upload. It's more than enough for most digital courses. But, if you're going to be adding weekly or monthly videos from lives sessions, then the Squarespace option won't work for you. That's why I chose to go with a standalone platform.

So, let's talk digital courses and communities.

I mentioned that I built my own digital-course platform right on my old Wordpress website back around 2015. Pain in the ass. But I got everything I wanted exactly how I wanted it to look and feel.

This time, when I created the Women Podcasters Academy, I did *not* want to do it on my own. There are so many digital-course platforms out there. I knew that at least one of them would be able to meet all of my exacting standards!

You can hear all of the details of how I created that course and community in my episode called "How I Started a Digital Course and Community"—link in the show notes.

For here, I'll say that I did a free trial of three different platforms. One of them I just didn't like at all. The user interface was yucky and clunky. And I couldn't find a way to upload PDFs. So, that was an immediate "no."

Another was excellent, but you couldn't have an affiliate program for your course. I needed one because I had several people who wanted to share my course and community as affiliates. So, that platform was also a "no."

The third one has everything I need *and* looks great. So, I use Podia.

Podia isn't one of the "biggies" yet. So, you might not have heard of them. But you should definitely check them out and take advantage of their free trial, if you're looking into creating a digital course or community.

I was doing both. I needed to platform to host a podcasting course, with PDFs and videos. And I wanted to host my community on the same platform. I didn't want members to have to log in at two different sites. And I did not want to use Facebook for the community. Posts in Facebook get lost too easily. I wanted way more order than that!

Podia allows me to create a full course and a separate community. I can sell them separately. I can sell the community and have the course as a free component of the community. I can still sell the course on its own, or I can hide it so that it's not available separately.

I can choose different membership levels. I can price the membership monthly or annually. I can set up an affiliate program.

I can add multiple pages to the public website of the Women Podcasters Academy. So, I've got the homepage. Then I added a page that features members' podcasts.

Designing the website is super-easy. Now, you don't have a ton of flexibility, which is a mixed bag. On the one hand, I was disappointed since I'm a website designer. But, on the other hand, I had the sales page and the homepage done in a few hours.

Podia integrates with Stripe, so payments are sent to my bank within a few days.

Next let's talk about email service providers. You need a lead magnet on your website. So, you need a way to collect email addresses. And you're going to be emailing your list weekly. The easiest way to create content for the newsletter, by the way, is by blogging or podcasting weekly. That way, your newsletter consists of writing a brief personal message then sharing just a short snippet from the blog or podcast with a link so they can read or listen to the rest on your website.

I've tried several other email service providers over the years. All the biggies. And I've landed on ConvertKit.

I love how easy it is to create landing pages, embeddable forms, and popups. Yes, popups. I know you hate them. I do, too! But they are an effective way to get people onto your email list.

I discuss popups more in my blog post called "How Do I Get People to Sign up for My Lead Magnet"—link in the show notes.

ConvertKit has fabulous email templates. Though I just use a blank one and keep the format really simple. It's easier for people to read emails on their phones when they're mostly plain text and just a few links. So, I stopped doing a banner and background color.

I love ConvertKit's visual automations. This is where you set up what happens when someone signs up for a lead magnet, for example. I have one automation set up so that when someone signs up for my website checklist lead magnet, the first thing that happens is that they get tagged with "website checklist." Tagging them will let me know what they had signed up for. That way, I could choose to send just those people a special email one day, segmenting them by that tag.

The next thing that happens in that automation is that that person gets added to an email sequence. The email sequence is something that you set up separately in ConvertKit. It can be as simple as having that one thank-you email that gets sent immediately when someone signs up for your lead magnet. You schedule it to go out immediately. You put a download link in the email. And you tell them that they'll be getting your email newsletter from now on. You also mention that they can unsubscribe at any time.

You can have other emails in your sequence. For example, you may want to send a sequence to new subscribers where you follow up maybe 5, 10, and 14 days later. You make this part of that visual automation. ConvertKit makes this so easy.

You can now sell products through ConvertKit. I have a podcasting consultation set up through them. It's a simple product page—which looks like a landing page. People can pay for the consultation right there. And my Stripe account is integrated through ConvertKit.

When someone buys the consultation through ConvertKit, the confirmation email contains a scheduling link from HoneyBook so that they can schedule their session right away. And, of course, that scheduling link will automatically create a Zoom meeting.

If you use my link to sign up for ConvertKit, you'll get a discount of 30%.

Let's move on to podcast hosting providers. There are *so* many. And, honestly, most of them are great! You can even save money by hosting your podcast through Squarespace, Wordpress, or Kajabi.

But I highly recommend using a dedicated podcast hosting provider because you tend to get more listens and downloads that way.

I've tried two—Libsyn and Buzzsprout. So, I got slightly more listens and downloads through Libsyn because they list you in their directory. But I love the user interface at Buzzsprout, and I especially love a post-production tool that Buzzsprout has, called Magic Mastering. Now, that's an add-on, for an extra fee. But it is so worth it, especially if you're not a sound engineer, which I am not!

When you use a dedicated podcast hosting provider, they publish your podcast to Apple Podcasts for you. You *will* need to take a few extra steps. But this is easier than setting up Apple Podcasts manually.

Okay, setting it up manually isn't hard! But podcast hosting providers also get you set more easily on all the major podcast platforms.

They also give you beautiful audio players to add to your website. And you get powerful statistics to monitor your podcast's performance.

I like Buzzsprout's stats over Libsyn's. Again, I got slightly more listens and downloads with Libsyn. But it's the Magic Mastering that makes me stay with Buzzsprout.

Magic Mastering applies post-production sound-engineering processes to your episode to bring it up to industry standards. I currently edit my own episodes. I just enjoy doing it! But I am no sound engineer. I do my best. But there are times when I can't get the sound as good as I want it. Magic Mastering gets it to where it should be. It really is magical!

Alright, so, let's talk editing. Actually, let me go ahead lump in video, audio, and visual design editing here. Because it all falls under one roof with me. And that is all things Adobe.

I'm an Adobe person and subscribe to the Creative Cloud Suite that gives me Photoshop, Illustrator, Creative Cloud Express, Audition, Premier Pro, InDesign, and a bunch of other programs. I don't use Illustrator very often. But the others I just mentioned I am constantly using.

I use Adobe Audition to record my solo episodes, like this one, and to edit all of my episodes. Audition is used by many professionals and has a ton of advanced tools. I don't use them all because I'm not that advanced! But, anything I want to learn, I know I can.

I use Adobe Premier Pro to edit my videos. I share my video recordings from my guest interviews. I have pre-recorded videos for my podcasting course. For those, I added music and intro and outro animated clips. And I do weekly live sessions for the podcasting community. Sometimes I do a little editing of those.

I use InDesign to create PDF worksheets. I need these to be more beautiful than simply exporting from my word processing software. InDesign takes longer, but you get to customize every last bit of every single page. So, you get exactly what you want, more easily than trying to do in your word processing program.

I use Adobe Creative Cloud Express and Photoshop daily. I use whichever one I need —sometimes using both—to make episode-specific cover art, to design logos, to alter images for clients' websites, and to adjust or enhance photos.

Creative Cloud Express has a desktop version and an online version. It is an alternative for Canva, and I prefer it over Canva. As a standalone product, it costs less than Canva—currently $9.99 per month compared to Canva's $12.99 per month.

But it's a matter of personal preference. I love that Creative Cloud Express is backed by the power of Photoshop but with the ease of Canva. So, really, you get the best of both worlds.

There are other tools I use in my business, of course. But this is plenty to share now!

I will add, though, that I work on a MacBook Air with an M1 chip. It's plenty powerful for my creative needs. I use Apple Pages as my word processing software. I use Apple KeyNote for creating video animations. Simple and beautiful! And I use Apple Notes to keep track of things before putting them into a Pages document or a spreadsheet.

All right! That's it!

I hope you found this helpful. Always use free trials when you can. Your taste may be totally different from mine. I went through years of trial and error before finding tools that I love and fit me really well.

Here's what you can do:

Write down what you need and what you're currently using to fulfill that need.

Next, write down which tools you love and will not get rid of and which ones you're not married to and will consider switching out.

Then make note of which tools would be awesome if they could be combined into one big tool.

Now, for the ones you'd consider switching, check out my recommendations. See if they fit your style.

Ask colleagues what they use, how much they love what they use, and what in particular they love about it. I told her you what I love about my tools! So, you have an idea of what you'd get if you went with any of these tools.

Now that's really it!

You can leave comments on this episode's page on my website. Link in the show notes. I'd love to hear what tools you use and if you have any recommendations!

I'll be back in a few days. See you next time on the Marketing Chat Podcast!

———————————————————

Links mentioned in the episode (some may be affiliate links):
Adobe
Buzzsprout (You get a $20 Amazon gift card if you register through this link)
ConvertKit (Get 30% off)
Honeybook
Podia
Squarespace (Get 20% off an annual subscription)
"How Do I Get People to Sign up for My Lead Magnet"
"How I Started a Digital Course and Community"
Link to this episode

Angela Kelly Smith is a marketing strategist, Squarespace website designer, and the founder of the Women Podcasters Academy. Her mission is to help women entrepreneurs create the successful business of their dreams through strategic marketing that establishes them as authorities in their field and helps them attract more of their ideal clients.