

Outsourcing Marketing and Income Generation

Janet Switzer



Outsourcing Marketing and Income Generation

Virtually every task can be outsourced these days. And while *all of the key staff positions* in this tutorial *can* be outsourced, only you can ultimately decide which you'll want to outsource and which you will keep in-house with local employees reporting to your place of business.

Deciding What to Outsource

In the early stages of your business, you'll likely want to outsource much of your Internet marketing management, affiliate management and new-business development to specialty vendors and consultants—while you may want to keep your inbound phone answering, sales, and practitioner support in-house. This is recommended for two reasons: (1) you'll do very little specialized online marketing, recruit very few affiliates and field very few opportunities for expansion in the earliest days of your certification program (so a part-time outsider is most appropriate), and (2) you'll want to keep all coach and practitioner interactions very close to you in the early days so you can learn which sales pitches they respond to, what types of questions they frequently ask, what types of support issues arise and so on.

Of course, many certification programs today *outsource everything* to remote workers and independent contractors, but treat those team members as long-time staff and hold in-person meetings to bring the team together (twice a year, for example).

Outsourcing post-certification merchandise and service delivery is also an option—depending on your type of business, whether coaches and practitioners expect you to personally perform the work, the level of quality required, and whether outsource vendors exist for your type of business.

To determine what you'll need or want to outsource, take time now to make a list of all income-generating job functions in your company—whether you perform them or not. Just writing them down will help you determine whether you can outsource them—or wish to. Use the list of typical job functions below to help you create your own list:

New Business Development

- New client recruitment
- Joint-venture research and initiation
- New product design and development
- New markets and global expansion
- Licensing

Sales

- Sales script writing
- Sales training
- Leads analysis
- Sales presentations

Marketing

- Offline marketing and lead generation
- Online marketing and webmastering
- Public relations and media relations
- Trade show coordination
- Affiliate management

Practitioner Support

- Technical support
- Customer service and order tracking
- Billing resolution and save-the-sale
- Training calendar and access to your advice

To begin the process of outsourcing, decide which of the above duties you can comfortably delegate to someone else. Check off each job function you'll outsource using the checkboxes above, then record the specific duties you'll want the outsource vendor to accomplish. Like this:

- Affiliate Management Duties:
 - *Set-up affiliate registration area of CRM/shopping cart*
 - *Set-up "Join Our Affiliate Program" page at website*
 - *Write affiliate recruitment letter / email campaign*
 - *Recruit 25 affiliates from my personal Rolodex*

Job To Be Outsourced

Specific Duties I Would Like Accomplished...

_____ Duties: _____

_____ Duties: _____

_____ Duties: _____

_____ Duties: _____

_____ Duties: _____

_____ Duties: _____

You can also outsource other functions of your company easily and inexpensively. In fact, it's particularly smart to outsource those functions that require too much of your time—or require expertise you don't currently have, such as accounting. Take a look at the following list of other job functions in a typical company to help you decide whether to outsource additional jobs:

Administrative

- Telephone switchboard
- Purchasing
- Human resources and hiring
- Security
- Facilities

Manufacturing/Retail Purchasing

- Inventory management and warehousing
- Receiving and stocking
- New product and new supplier research
- Manufacturing plant management
- Prototype design and development
- Store design and Planogram development
- Supply chain management

Legal/Compliance

- Contract review and proposal review
- Employee policies and sales policies

Product/Service Delivery

- Scheduling
- Technician training
- Retail clerks, wait staff and service staff
- Production of consultant's work product
- Shipping and fulfillment

Financial/Accounting

- Billing and accounts receivable
- Bill paying and accounts payable
- Payroll and benefits management
- Tax accounting and financial reporting
- Banking (outsourcing not recommended)
- Account credit approval/management
- Securing loans/credit facilities/factoring

- Corporate structure and corporate filings
- Intellectual property, trademarks and patents

Finding the Right Vendors or Independent Contractors

There are many places to start looking for independent contractors to outsource job functions to. And while working virtually may be uncomfortable to you as a business owner—that is, working with numerous contractors outside your city, some of whom you may never meet in person—be aware that today, entire multi-million-dollar businesses are run with remote workers, either on a partial or completely outsourced basis. The key is to find the right people, then manage communications, expectations and assumptions throughout the outsourcing relationship.

Your search for the right people may take two approaches: (1) Asking for referrals from other business owners you trust, and (2) searching through the many online resources that are designed to link business owners like you with professionals who work virtually. While the following is not a complete list of all such resources, they are considered to be the best in their category:

- Upwork.com—marketing professionals, internet professionals and all other creative types such as marketing copywriters, PowerPoint designers, graphic designers, etc.
- AgentsOfValue.com—Pay them a small monthly retainer to become your marketing/web team

While these sites are set-up to help you find a specialist for an individual project, it is possible to choose a contractor for your first project who offers many other types of services—effectively

making them your *de facto* Internet Promotions “Manager” or New Business Development “Manager.” This not only addresses your longer-term income-generation needs, but also carries the added benefit of costing you money only when the outsource vendor does work for you.

Negotiating Fees, Retainers and Budgets

In addition to the project bidding model used by Upwork and the fee structure of other sites, you can easily negotiate your own unique fees, retainers and commissions with any vendor you might work with. I’ve paid everything from monthly retainers for a pre-defined level of work to reasonable commissions only when sales are made—and everything in between.

To determine what you can afford to pay, first define how the contractor’s output will be used and what the anticipated income will be. Will they design a single brochure for your trade show (which by itself will do nothing)—or will they take over your entire trade show appearance including pre-show marketing, in-booth promotions, lead follow-up, and more which might earn you hundreds of thousands in new practitioner sign-ups?

Next, determine what you can afford to spend right now on *just getting started*—perhaps getting your three-page website written and designed, with you personally doing email marketing to the resulting opt-in names later. Many of these sites—particularly Upwork—draw specialists from all over the world including places like India, Romania and Phillipines where \$500 is a considerable sum for building a simple website. I’ve gotten many projects done through Upwork (formerly Elance) for \$250 to \$300. While the amount of money you’ll pay varies depending on your project needs, where your outsource vendors live, and so on, there are some steadfast rules and recommended methods for paying these people. Take a look at the chart below:

<u>Type of Contractor or Outsource Vendor</u>	<u>Method of Payment or Compensation</u>
Receptionists, call centers & inbound phones	Low per-month minimum rate + low per-minute rate for calls above this minimum.
Customer service centers	Low per month minimum rate + low per-minute rate for calls above this minimum.
Virtual customer service staff (individuals)	Per hour rate with a weekly listing of calls in order to verify hours worked.
Commissioned salespeople	Fixed commission per certification or service package sold <i>after</i> the money is received and funds clear your bank account. Commissions should also be reduced due to any refunds processed. Bonuses permissible for achieving pre-defined benchmarks.
New business development	Flat percentage (15% to 20%) of the net revenues from deals they bring in.
Affiliate manager	Flat fee per certification or per service package sold to practitioners referred by affiliates they recruit.

Internet promotions manager / webmaster	Fixed monthly retainer or fixed per-project fee for a pre-determined schedule of promotions and management or for a specific pre-defined project. Occasionally webmasters are paid additional fees by the hour for updating pages, building infrequent new webpages, and doing individual analysis.
Offline marketing implementation	Fixed monthly retainer or per-project fee for a pre-determined schedule of promotions and management or for a specific pre-defined project.

Providing Well-Defined Goals and Benchmarks

As I mentioned, there are steadfast rules for paying your outsource vendors. *Providing well-defined goals and benchmarks they must meet before getting paid* is one of them.

You would never blindly delegate a project to one of your own local staff, and then forget all about it. Well, delegating to outsource vendors is no different.

Before you assign the project, take time to determine the deliverables you expect *and when you expect them*—such as the initial layout of your website within two weeks or the initial draft of your brochure within six days. You can also designate how many hours you expect the vendor to work to accomplish the task—asking them to check in with you after six hours of work to be sure the project is on track.

I also ask my vendors to agree to finish the task with a certain number of hours, then tell me if they can't accomplish the job in that time. This keeps vendors from spending 16 hours on a project you thought would take only two. If they're spending more time that you expected, something about the original project description or instructions is unclear.

Another way to be sure the project is on track—and guarantee you aren't being charged more than you anticipate—is to hold regular Zoom meetings about the project. When it comes to projects going off-track, I detest email, instant messaging and voice mail. I want answers immediately—and the best way to do that is to jump on video-conferencing and speak directly to the vendor working on your project. Internet vendors in particular seem to prefer email updates, but that's never as good as person-to-person contact. Even if your vendor is halfway around the world, you can hold regular update meetings by Zoom or another video-conferencing platform.

DISTRIBUTING THIS DOCUMENT OR ITS CONTENTS IS NOT ALLOWED:

Please note that this document is an image-only locked PDF file that allows printing, but not extracting of data. The contents are protected by international copyright laws and are provided for education purposes only. They cannot be duplicated, distributed and/or used for any other purpose.

Downloading this document does not transfer any rights whatsoever to the document or to its contents—nor does downloading convey so-called “reprint rights.” Unauthorized transfer or use of the contents (including posting it at your website, distributing it to your own clients or students, or incorporating it into your products) is prohibited by international copyright laws.

ABOUT THIS DOCUMENT:

© 2009, 2025 Success Resources International Inc.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the written permission of the copyright owner.

Disclaimer and Limit of Liability: The publisher, author, and copyright holder (collectively, “we” and “our”) have used our best efforts in preparing this publication. Other than the use of our best efforts, we make no representations or warranties with respect to this publication. In particular, we make no representations or warranties with respect to the accuracy or completeness of the contents of this publication. We specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranties may be created by implication. No oral or written statement by us or any sales representative or other third party shall create any warranties. We do not guarantee or warrant that the information and opinions stated in this publication will produce any particular results, and we caution readers that the advice and strategies contained in this publication may not be suitable for every individual or business. We, individually or collectively, shall not be liable for any monetary loss, physical injury, property damage, loss of profit or any other commercial damages, including, but not limited to, special, incidental, consequential or other damages.

This publication and its accompanying training program are distributed with the understanding that we, individually or collectively, are not engaged in rendering legal, accounting or other professional advice. If legal advice or other expert assistance is required, the services of a competent professional should be sought. Some names, characters, places, statistics and incidents used in sample advertisements and sample marketing copy are either the product of the author’s imagination or are used fictitiously. Any resemblance to actual events, locales, organizations, data or persons, living or dead, is entirely coincidental and beyond our intent.

All trademarks contained herein are the property of their respective owners.

ABOUT THE REPLICATE PEER-CERTIFICATION PROGRAM:

Founded by industry veterans Paul Martinelli and Janet Switzer, the *Replicate Peer-Certification Program* helps business owners, professional practitioners, and subject-matter experts create a network of their own consultants, peers, coaches, trainers, or fellow entrepreneurs who are proficient in the experts’ proprietary methods and who can bring this important knowledge to millions of consumers and entrepreneurs worldwide.

Learn more at: www.replicateprogram.com

Email: success@replicateprogram.com