

# CAPABILITIES DECK

## BUILDER - BUBBLE SHEET EXERCISE

When discussing the mindshift that needs to take place when transitioning from employee to business owner, this exercise is a great place to start.

As an employee, you presented your resume to potential employers so they can get an overview of your skills. As a service-based business owner, that is replaced with a capabilities deck. Use this tool as a guide to help you create your capabilities deck by bubbling in the areas you feel 100% confident you can deliver on for your clients.

**PRO TIP** – Be sure to upload your capabilities deck to your website and share it with potential clients before your discovery call so that they can get an idea of your skillset and what they can look forward to delegating. It can lead to more productive discovery calls and bigger projects!

### ADMINISTRATIVE SUPPORT

- Email Management & Correspondence
- Scheduling and Calendar Management
- Electronic Filing and Management
- Online Research
- Travel Arrangements
- Inventory Management
- Sourcing & Ordering
- Presentation Creation

### HUMAN RESOURCE GENERALIST

- Recruiting Support and Management
  - Job Description Creation
  - Ad Posting
  - Pre-Screening
  - 1<sup>st</sup> Round Interviews
  - Offer Letter Presentation
- Employee Onboarding
  - Welcome package preparation
  - Employee file checklist management
  - Onboarding call and handbook review
  - IT coordination
  - Payroll system enrollment
  - Benefits administration and enrollment

- Payroll Management
- Benefits Management
- Employee Review Management
  - Review document preparation
  - Review reminders and scheduling
- Incident & Accident Report Management
- Employee Termination/Release Management

### BOOKEEPING

- Account Receivable
- Account Payable
- Invoicing
- Account Reconciliation into QuickBooks

### BUSINESS DEVELOPMENT

- Initial Sales Call
- Follow Up Calls
- Customer Service
- Sales Pipeline Management
- CRM Management – for Business Development
  - Lead Nurture and Management
  - Presentation Creation
  - Proposal Creation
  - Contract Creation

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## BUILDER - BUBBLE SHEET EXCERISE

### MARKETING SUPPORT

- Content Creation
- Blogging
- Review and Editing Services
- Newsletter Creation & Formatting
- Contact Management
- Website Management
- Website Updating
- Run of Show creation
- Day Of Event Support & Management
- Registration Set up and Management
- Schedule Management
- Greeting and Delegate Support
- Vendor Communication

### PROJECT MANAGEMENT

- Project Planning
- Deliverables Scheduling
- Team Accountability Tracking and Management
- Creation of Standard Operating Procedures
- Management of Project Management Systems

### EVENT SUPPORT

- Pre-Event Administrative Support
  - Email Management
  - Delegate Communication
  - Speaker Communication and Management
  - Vendor Communication and Management
  - Sponsor Communication and Management
  - Vendor Sourcing & Management
  - Template and Document creation

### SOCIAL MEDIA MANAGEMENT

- Graphic Creation
  - Memes
  - Headers - Social Media Account
  - Headers - Newsletter
  - Featured Images
- Setting Up Social Media Accounts - For Business
  - Instagram
  - Twitter
  - LinkedIn
  - Facebook
  - YouTube
  - Pinterest
- Social Media Ad Creation
  - Instagram Ads
  - Pinterest Ads
  - Facebook Ads
  - LinkedIn Ads
- Online Community Management
  - Communication Management
  - Community Engagement
- Digital Optimization

**Niche Specific Processes You Know:**

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## BUILDER - BUBBLE SHEET EXCERISE

Software & Systems you are proficient in using:

### CRM's

- Infusionsoft
- Salesforce
- Ontraport
- HubSpot
- 17Hats
- Other:\_\_\_\_\_

### Communication - Chat

- #Slack
- WhatsApp
- Google Voice
- Google Hangout
- Join.me
- GoToMeeting
- Zoom Conference
- Uber Conference
- Skype
- Remind
- Other:\_\_\_\_\_

### Communication - Email Marketing

- Constant Contact
- MailChimp
- Kajabi
- Infusionsoft
- Other:\_\_\_\_\_

### Video & Audio

- YouTube
- Vimeo
- Podbean
- Loom
- Zoom
- Other:\_\_\_\_\_

### Project Management

- Asana
- Basecamp
- Teamwork
- Trello
- Monday
- Microsoft Team
- Other:\_\_\_\_\_

### Financial

- QuickBooks
- FreshBooks
- NPC Secure
- PayPal
- Square
- Stripe
- CashApp
- Google Pay
- Tiny Invoice
- Other:\_\_\_\_\_

### Email & Calendar

- Outlook
- Gmail
- Network Solutions
- Microsoft365
- Calendly
- Acuity
- YouCanBook.me
- TimeTrade
- Other:\_\_\_\_\_

### Payroll Systems

- ADP
- Gusto
- Paychex
- Other:\_\_\_\_\_

### Storage

- Dropbox
- Basecamp
- Google Drive
- Box.com
- One Drive
- LastPass
- Other:\_\_\_\_\_

### Creative Tools

- Canva
- Adobe
- MuseCam
- SparkPost
- Other:\_\_\_\_\_

### Social Media

- Facebook
- Twitter
- Snapchat
- Instagram
- YouTube
- Hootsuite
- Buffer
- Tailwind
- Planoly
- Other:\_\_\_\_\_

### Website Management

- WordPress
- Wild Apricot
- Wix
- SquareSpace
- GoDaddy
- Other:\_\_\_\_\_

Niche Specific Systems You Know:

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