

This is an edited transcript of the May 27, 2015 SmallBusinessTalent.com podcast interview titled – [Brian Shea on the Four Paths to a Simpler and More Successful Business](#).

Announcer: Are you a hard-working, self-employed professional striving for small business success? There is help. Welcome to the SmallBusinessTalent.com podcast featuring candid conversations about successful self-employment.

Stephen Lahey: Welcome to the SmallBusinessTalent.com podcast. I'm Stephen Lahey, and I'll be your host.

My guest on the podcast today is [Brian Shea](#). Brian specializes in helping independent professionals and small professional services firms put sales and marketing systems in place and efficiently land more ideal clients.

As the owner of [Shea Consulting](#), Brian implements CRM and marketing automation, such as email marketing, for his clients. As a result, they are able to eliminate manual, repetitive tasks and amplify their sales and marketing results. Over the years, Brian has served a variety of small firms, and they all have one thing in common—they're incredibly busy delivering their services and need to become more efficient in their customer relationship management and new business development efforts.

Today on the podcast, Brian shares some useful tips from his free eBook, [The Time to Grow: Four Path to Simplifying and Growing Your Business](#). I know you're going to find his advice interesting and highly practical, so get ready to take some notes and enjoy the interview.

Welcome to the podcast, Brian.

Brian Shea: Hey, Steve. Thanks a lot for having me. Glad to be here.

Stephen Lahey: To kick things off, tell us a little bit about your professional life before you became an entrepreneur, what prompted you to start your own consulting firm, who do you serve? All of that.

Brian Shea: Before I started my own business, I worked for about ten years in what we call marketing systems. So I worked for companies and

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nonprofits in their marketing departments setting up and managing CRM systems and email marketing systems and all the technical stuff that makes marketing work in the business and nonprofit world. I did that for about ten years, had a blast doing it, but I had always known when I started my career that I wanted to work for myself eventually

So in 2012 I kind of made the leap from the corporate world to my own business. My daughter had just been born and that was very much the inspiration for me. It felt like the right time, so I jumped ship.

For the first two years, I did a lot of corporate consulting, so I had a lot of relationships in the corporate world in marketing and technology and did a series of kind of large-scale consulting projects for big companies.

In those years 2012, 2013, and 2014 as I was working with big companies, I was also networking and doing more and more work with small companies and business owners. As time went on, I found that was a great fit for me. Number one, and it was something that I enjoyed. I enjoyed the corporate space too, but there was something about working with business owners that really energized me.

So, today the focus of my business is helping small business owners by building very efficient sales and marketing processes for them. What I've found is that business owners come to me when they're feeling overwhelmed inside their business, particularly with their sales and marketing. They feel like they don't have any time to do the work they want to do and develop new business too. They're kind of chasing sales or they're chasing projects, sometimes they're a good fit, sometimes they're not, and what they're looking for is really to build and grow a healthy business.

And the types of businesses that my company works with are primarily small business-to-business professional services companies – small consulting firms, coaches, marketing agencies, small training companies. These are generally less than 10 or 12 people and they are established. But to get to where they want to go, whether that means growing or whether it means creating a more balanced healthier business, what they need is a bit of help making their marketing and sales more efficient and putting some

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processes and systems in place to help them do what they're already doing well, but doing it in a more systemic, more efficient way.

Stephen Lahey: That makes perfect sense. It's all about focus, strategy, and systems. I think that's pretty much what you've just said.

Brian Shea: Yes.

Stephen Lahey: Now, you wrote a really interesting eBook. It's brief, but there's a lot of really good stuff there. It's titled [*The Time to Grow: Four Paths to Simplifying and Growing Your Business*](#). What motivated you to write it?

Brian Shea: I was working with business owners, and from the outside their businesses looked great. They're making money, they've got solid brands, they've got a great client list, but on the inside, those business owners are feeling really overwhelmed and they were feeling spread really thin.

I was chatting with a friend of mine, this was probably about a year ago, and he was like, oh, so what's going on with your business? I was like, oh, I found a real great niche. It's helping, and I used the term, "successful business owners". And he said, well, if they're successful business owners, what do they need your help for? And I said, well, I guess I'll qualify it there—successful in the sense that they've got these great businesses, but they've got this feeling of being overwhelmed. And I think there have been times in my business where I've felt like that, and obviously there are other people out there where you build this business and you've got money coming in, you've got clients, but there can be that feeling of just being stretched too thin.

So, what I do is work with those business owners figuring out what works specifically in their sales and marketing efforts and help them to do more of that. We get rid of the stuff that isn't working, we systematize and automate stuff that's manual and repetitive and then that frees up a whole bunch of time and resource so they can really double down on the important things that they're working on.

That was really the motivation for the book as well as to be able to help business owners kind of take a step back and look at the different parts of their businesses and see what's working and then

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streamline and eliminate stuff that's not and, where possible, automate stuff that's manual and repetitive and doesn't add a lot of value and kind of stresses people out. So that was the motivation behind the book.

Stephen Lahey: Makes sense. I have a new word for you.

Brian Shea: Cool.

Stephen Lahey: You work with successful entrepreneurs who are stressed.

Brian Shea: Right.

Stephen Lahey: Here's the new phrase "SuccStressful Entrepreneur". [Laughs]

Brian Shea: Yeah, that's right. You really hit it.

Stephen Lahey: Feel free to borrow that.

Brian Shea: Ha! That's really great. It's funny because it's like—and this is another thing. I was actually talking with another guest of yours, Charlie Gilkey, about this. He wrote a book called *The Small Business Lifecycle*. I don't know if that was something that you spoke with him about, but—

Stephen Lahey: Yes.

Brian Shea: —in his book he lays out five different stages of running and building a small business. The first one is the aspirational stage, and that's very much the person who is maybe in a corporate job and wants to leave and sort of is in the process of making the decision to kind of make the leap. And his point was that there's a lot of media out there and articles and stuff that are written for that market and he said that's awesome, but one of the things that it sort of avoids is the fact that making the leap to owning a business is a huge leap but then after that there is additional leaps that you need to make in these other stages. I think that was sort of what my friend and I were hitting on when we were talking about kind of the, to use your term, the succstressful entrepreneur.

Stephen Lahey: Exactly. Now, because we've got a lot to cover in the podcast, here's what I would suggest. In your book, you go into four ways that we can simplify our current processes and save time, grow

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business and sales, just like you've been discussing, so why don't we walk through these sort of one at a time, rapid fire style, okay? The first is about how to standardize your projects. You've kind of touched on that, but why don't you give us a little bit more meat on the bones. How do we standardize our projects and why?

Brian Shea:

Sure. So really that's about—there's a couple things. Number one, it's about who you're serving. Who is your ideal client? And number two is what problem are you solving for them? Once you understand those two things and you look back and you say, okay, here are the projects I've done in the past, here are the ones that were successful, here are the ones that were not, then you can start to see patterns, and you can start to see the types of projects that are ideal for you. And the idea is to build everything around the ideal project types so you can focus on them and then get rid of the ones or avoid the ones that aren't ideal.

I'll use an example from my own business. I said that I work with small professional services companies, right? In small professional services companies, by and large, you'll see patterns. You'll see the same types of problems that they're all running up against. On the flip side maybe they'll use the same types of successful tactics. One of the things that a lot of the businesses I work with do really effectively is they do a lot of in person marketing, a lot of events, a lot of speaking. That's a really effective tactic for them. So as I work with them, that's something that I get a lot of experience in and I get a lot of past work or templates that are applicable to multiple business, so it gives me a lot of efficiency in the projects that I run.

Now contrast that, in the past I've worked with product companies. Product companies have a whole different business model. They're not looking for a dozen or two dozen projects a year like a professional services company is. They're looking for, a lot of times, a much higher volume. They have a different set of marketing tactics that they use successfully. It's a different business model. So I've found when I just focused on the professional services and didn't focus on the product companies anymore, it just gave me this great efficiency where I was able to reuse a lot of the basic approaches over and over again on my projects and then eliminate the very customized stuff that can really drag you down as a solo business owner.

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Stephen Lahey: Again, it's strategy, focus, efficiency. Love it. Now, in the second "Path", you talk about what seems like a mundane subject but it really isn't, it's a very important one – "Create Better Estimates". Can you walk us through your thinking on that?

Brian Shea: You're right. It seems like a totally boring, mundane subject, but it's one of those ones that as a professional services company, we run into so much, and it can really bite you. If you have a project that you think is going to take two months and it's going to cost you \$2000 to outsource part of it, but in reality it takes you twice as long and it actually costs you \$6000 to outsource it, then you've got a problem.

So, what I focus on in this second chapter is really the idea of breaking things down to the lowest level you can, break down the work that you think is involved with the project that you're bidding on or about to take on. Really think about, from your experiences in the past for each kind of component of the work, break it down as much as you can and think about, well, how could this go well and then, importantly, how could this not go well? Use some relatively basic estimating tasks and be conservative with your estimates. It's just one of those things—especially starting out—it can really drag you down. If you're 10 or 20% off on your estimates, it can just really eat into your margin on your projects.

Stephen Lahey: So, what would be an example of a shift that either one of your clients made or that you made that helped you to create better estimates?

Brian Shea: Well, one thing, probably the biggest thing that I've done and I work with my clients on is to break the estimates, or break the statements of work down into smaller projects. So especially as a professional services company, we may want to bring in huge projects with big dollar amounts associated with them. The danger with that is when they get too big, right, if you're estimating out a six month project, let's say, there's a lot of risk associated with that because if you're off in your estimate, you're now locked into six months worth of work that you're off on.

So what I've found—I'm working with a partner right now and it's on a large marketing systems project, and there's a lot of upfront analysis we need to do. What we decided to do, instead of bidding out for the whole project, including the strategy and the software

implementation, what we decided to do is break it up into two projects. We said we're going to do a strategy piece for you, and that is going to be X amount. It's going to take this long. And then, once we're done with that, then we're going to do the Phase 2, which is implementation. And that gave us less risk and it gave the client less risk because they know they're going to get the right project when it comes to the implementation rather than just having this big hulking thing that we estimated three or four months ago and may be out of date.

Stephen Lahey: Yes, and I would also say along with creating better estimates, it's good to create better contracts.

Brian Shea: Yes.

Stephen Lahey: We won't go too much into that, but it's important—

Brian Shea: Absolutely.

Stephen Lahey: —and it's a whole other topic. Okay, so now the third path of the four paths you discuss in your book is “Streamline Your Sales and Marketing”. Well, that sounds great to me. So, how do we streamline our new business development efforts in an efficient and strategic way?

Brian Shea: In the book, I talk about two different systems that every business owner should have in place. One is a CRM system where they can manage all their contacts and their prospects and their clients. The second is what I call in the book either an email marketing or marketing automation system, which helps them communicate with those contacts and those prospects.

Stephen Lahey: So let's just say this. CRM is Customer Relationship Management. We won't go into all the details, but you can use very basic customer relationship management software, which they used to call contact management software at one time.

Brian Shea: Yes.

Stephen Lahey: You can even have a “Social CRM” system, which allows you to pull in client information from social media.

Brian Shea: Right.

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Stephen Lahey: I interrupted you, please go ahead.

Brian Shea: I mean, the idea behind it, again, I work with professional services companies and in those types of companies the most important asset that they have is the relationship with their audience, their prospects, their clients. And what marketing systems allow you to do is invest in those relationships in the right way and manage them in the right way.

What I hear so many business owners saying is two things when it comes to keeping in touch with their people. Number one, prospects and clients keep falling through the cracks. There's this client that I had nine months ago, I wanted to follow up with them in January to tell them about our new services, and now it's May and I still haven't followed up with them because I forgot to—and that happens too often. And so they're losing business, their relationships are going cold just because of the volume of relationships they want to keep going, which is great, but it gets very disorganized. So that's one thing.

And the second thing is just that, again, going back to that feeling of overwhelm. Business owners have so many people they want to keep in touch with it just gets very stressful trying to manage all that. A lot of business owners are keeping this stuff on either spreadsheets, or pieces of paper, or in their head, or in email, etc. But what CRM systems allow you to do is to be organized, to feel in control, to much more efficiently keep in touch with people with stuff that's going to help them, whether it's content or videos or blog posts, whatever it may be, or just to keep in touch with them with the types of communications, one off emails, that are so important, or phone calls that are so important. Just making sure people know you're still around, making sure you're still adding value, letting people know what you're doing in your business, new services you have, and how you can help. So really the idea is putting the right tools in place so people can be in control of this important thing called sales and marketing.

Stephen Lahey: Yes, and I know that you're a trainer who works with folks who want to implement Infusionsoft, which is one system, and there are many other good ones. But Infusionsoft does sort of double duty—

Brian Shea: Yes.

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Stephen Lahey: —as both a customer relationship management system, as well as setting up auto responder sequences by email and a whole variety of different things.

On the other hand, I've known people who use email marketing blasts, but they have high-end clients, and if it were me, when my client is worth, say, \$30,000, then I would be sending them highly-customized communications.

Brian Shea: One thing I just want to call out—and you made a great point which I just want to reiterate—there are a whole bunch of tools out there, customer relationship management tools, email marketing, marketing automation, all these different tools, and I think you said something that should be repeated, which is finding the right one for your business is crucial.

Like you mentioned, Infusionsoft is one of the core things that I offer in my business, and the reason why I offer it is because for my types of clients and for the problems that I'm solving for them, which are around getting more efficient with their sales and marketing, I have found Infusionsoft is a great tool to solve these problems. But there are business owners that are just starting their business and they're just starting to develop a list and develop their list of contacts and relationships, and for them there are other tools out there. For example, I've used Contactually in the past, which is a nice start-up CRM tool. And you might use something like MailChimp for basic email marketing. On the other end of the spectrum there are inbound marketing tools like HubSpot, etc. And I guess what I'm trying to say is there's no one perfect tool out there. There are different case studies and different types of problems and it's really about finding the right tool that fits your problem, whether you identify it on your own or you work with somebody like myself to figure out what the best tool is.

Stephen Lahey: Lastly, you call path four “Hire Someone to Help. Now, let me just say, I think that scares many of us who are solopreneurs.

Brian Shea: Yes.

Stephen Lahey: We're solopreneurs partially, if we admit it, because we're control freaks. I mean, I can admit that.

Brian Shea: Right.

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Stephen Lahey: So deep down we think no one can do it as well as I can. But for administrative tasks, for example, do they really need to be done perfectly? Maybe not. Especially not at the expense of more important tasks.

Brian, how can we know when it makes sense to get outside help and outsource stuff to either a virtual assistant or even hire someone? What are some of the tips you share in that “Hire Someone to Help” section?

Brian Shea: I think one of the things in that eBook that some people have gotten intimidated by is this idea of hiring. People think immediately in terms of hiring an employee, like a full-time employee. I understand why that’s intimidating, especially to a solopreneur. That’s a big decision to make.

But as you're running your business and you're building it, you're growing it, you have all these responsibilities, as you know. I mean, if you're the solopreneur, you're in charge of delivering your services, you're in charge of doing the books, you're in charge of marketing—you're in charge of everything. What I've found a lot of business owners run into is that there are things that they don't like to do or they're not doing and this is tripping them up. And my reason for writing this last chapter was really to say if there's something in your business that's holding you back, then look around and get some help.

The personal example for me is bookkeeping. So that’s a big area for me where it just isn’t something that I’m good with keeping up on, so I got some help on it. And I certainly didn’t hire anybody in terms of an employee or even a full-time contractor. But I have used a few different tools and part-time freelancers to help me with that just because it was something that kept being a stumbling block for me.

The other thing—this is the example I think that I put in the eBook—is I did a podcast and I loved doing the interviews. Well, I hated doing the editing. And every week it seemed like Friday afternoons, I was sitting at my desk editing audio for a podcast. It would take me an hour or two every Friday afternoon. It was something that always sort of brought me down before the weekend. So, I ended up hiring a podcast editor for not too much

money and it freed me up on my Friday afternoons, and it was just something I'm really glad that I did.

So I think when I'm talking about that hiring thing, it's really about looking at your business and asking are there places where you get a really bad feeling? And asking, is there somebody who can do this better than I can whether it's a freelancer or whether it's something as big as hiring an employee.

And one thing I do want to mention, too—it's something that you and I chatted before we got on the call today—is this idea of scaling. I think you and I both agreed the media out there is—there's this assumption that every business should scale, and I think with solopreneurs or even with established small businesses that have a few different employees, scaling is not always the right move. Some people want to remain solopreneurs and that's great.

For me, in my own business, I don't have a vision of hiring a whole bunch of people and getting big. My vision is to work with the great clients that I want to work with, and I don't need to get bigger and bigger to do that. So I think it's a great thing for all business owners to sort of take a step back and figure out okay, what do I want to do longer-term? We get all these messages from the mainstream business media about this is “the right way” to do it, but there are a whole bunch of different ways to do it and this decision should be based on what you really want to do and your personality and your business goals.

So, it's really about finding what's right for you and if there's a part of your business that you don't want to handle anymore, then don't do it. Granted, it might cost you 200 bucks a month to outsource something, but if it saves you 20 hours of work that you hate and that allows you to feel better, it allows you to feel less overwhelmed, and it allows you to focus on stuff that actually helps your business, then that could be ideal.

Stephen Lahey: Yes, and I think early on for most of us, it's okay to do things that aren't that efficient if they add to—

Brian Shea: Absolutely.

Stephen Lahey: —they personalization of our marketing message, add to our ability to connect with people who are referral partners or potential

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clients, all those important things. As we ramp up, things can change. At some point in time, when you're profitable and you're thinking – if I have to edit another podcast, I'm going to bash my head against the wall. Well, maybe it's time to outsource.

Burn out is a real issue for solos. And I think because most of us came out of the corporate world before we were self-employed we sometimes divorce ourselves from the equation. As if our business is like a corporation that's separate from us. Well, no, we're solos. We are the business. So, I think it's just important to be aware of that tendency.

Now, we're running out of time, and as we wrap up I'd really like the listeners to get a free copy of your eBook because I think it will frame these issues in even more specific terms and reinforce what we've been talking about today. And I want them to be able to connect with you online too. So how can they do those things, Brian?

Brian Shea: So, they can get my free ebook at TheTimeToGrow.com. My business website is SheaConsulting.biz and there are some free resources there too. There's a blog that a lot of people really like and a newsletter that they can sign up for that comes once a week. I've gotten some really positive conversations going on the newsletter and the blog. So I encourage people to check out those two sites, and I'm always excited to connect with people and chat with people on social media and over email and everything else.

Stephen Lahey: That sounds great, Brian. And just one last thing. You have a podcast, which I think is very well done, and that has its own URL. If they want to check out your podcast, what is the web address for that?

Brian Shea: It's IndieConsultantsPodcast.com, and like I said, there's about two dozen interviews on there with business owners. A few of them that come to mind are Pam and Charlie—Pam Slim and Charlie Gilkey who were on your show—and there's some other great business owners there that they can check out.

Stephen Lahey: I enjoyed it and I recommend that people get to know you because you're doing good work. Thank you again for taking the time to join me, Brian.

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- Brian Shea: Thanks a lot, Steve. This was a blast. I really appreciate it.
- Stephen Lahey: And to our listeners, thank you for spending some time with us today. If you like what you heard, I encourage you to visit SmallBusinessTalent.com now and subscribe to the podcast by email. When you do, you'll be alerted whenever I post fresh podcast content, of course, but you'll also receive special resources for email subscribers only, including my LinkedIn Guide to Social Selling, and much more. Thanks again for listening today and best wishes for your success.
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