

A FREE GUIDE FOR BUSINESS OWNERS



OPERATION STREAMLINE

100+ Ways an Online Business Manager Can Grow Your Business

For busy founders who are ready to let go of the day to day and finally focus on the work that lights them up.

What Does an OBM Actually Do?

THE OFFICIAL DEFINITION

An Online Business Manager (OBM) is a virtually based support professional who manages online businesses, including the day-to-day management of projects, operations, team members and metrics.

But there's a bigger question worth asking: what is the purpose of an OBM, beyond what they do?

It boils down to one simple thing: **an OBM frees you up so you can spend your time and energy on the things that only you can do in your business.** Marketing, sales, client relationships, product development, strategic partnerships and big-picture planning: these are the activities that actually grow a business - and they need you in the room.

Everything else can be managed by someone else.

"The role of the OBM is to delegate, not to do. They may not be the one actually doing the work, but they're responsible for building and managing the team that does."

Most business owners look to hire an OBM at the same point in their journey: they have a solid business plan, revenue is flowing in, and they're tired of being the one who has to "take care of everything." To take your business to the next level, you need to step out of the daily management activities and focus on growth.

01

You have a proven offer and steady revenue, but no time left to grow it further.

02

You're the bottleneck. Every decision, task and fire still runs through you.

03

You're ready to build a team but don't have the bandwidth to manage one.

100+ Ways an OBM Can Help

Here's everything an Online Business Manager can take off your plate.

01 Manage Planning

- Coordinate planning activities (monthly, quarterly, yearly)
- Lead planning sessions
- Assist in determining priorities
- Oversee implementation of plans

02 Manage Projects

- Create project plans, including timeline, process, people and other resources
- Setup and maintain an online project management tool (the virtual office)
- Delegate details of the project to various team members
- Communicate project status and ongoing details to all team members
- Follow up with the team to ensure that stuff gets done on time
- Manage the budget for the project
- Handle challenges as they arise, with a focus on finding a solution quickly

03 Manage Team

- Identify team needs based on current business goals and projects
- Create measures of success for each team role
- Determine what type of specialist would be the best fit
- Craft job postings and details
- Share the opportunity out across various networks
- Filter initial responses and review portfolios
- Set up interviews
- Narrow choices after initial interviews and request proposals
- Set up second interviews (if necessary)
- Check references from other clients
- Review proposals from preferred candidates
- Make the offer to the selected candidate
- Ensure there is a signed contract in place for all hires
- Create a communication plan with new team members
- Onboard and train the team for their role
- Report on measures of success for each role
- Manage 90 day reviews (long term) or end of project reviews
- Keep the team motivated in their work
- Handle team challenges as they arise
- Manage the team budget and expenses

04 Manage Operations

- Review the key systems needed to run the business: customer service, billing, communication, back-ups, marketing, follow-up and delivery
- Create processes, tools and players for key systems within the business
- Implement automated business tools and software to manage various systems
- Create and maintain Standard Operating Procedures (SOPs)
- Manage all client payments and the collections process
- Manage systems access and login information
- Ensure there is an effective backup system in place for all information
- Establish decision-making guidelines for team members

05 Track Metrics

- Keep track of key statistics for the business on a weekly and monthly basis
- Set up a reporting system that includes what to track
- Analyse metrics and present trends and patterns

06 Manage Revenue Streams

- Manage the production and completion of revenue streams: coaching programs, memberships, virtual and live events, books, multimedia products
- Manage the setup of any tools or software needed for different revenue streams
- Manage the deliverability of revenue streams, e.g. setting up an opt-in page for a lead magnet
- Ensure customer service is in place to support each revenue stream
- Ensure new clients get immediate access to their purchases
- Set up fulfilment for any tangible or shippable items
- Manage the ongoing maintenance of revenue streams
- Review revenue streams regularly for outdated information or refresh opportunities

07 Manage Website

- Review content across all websites for outdated or incorrect information
- Manage all updates to website content
- Manage the creation of any new websites
- Find and manage web designers, graphic designers and copywriters as required
- Set up everything behind the opt-in button for list building
- Set up everything behind the buy button for purchases
- Test all links, forms and buy buttons for errors and inconsistencies
- Ensure Google Analytics (or similar) is in place on all websites
- Ensure social media applications and plugins are in place
- Source testimonials for inclusion on web pages
- Set up a store page listing all products and offerings

08 Manage Email Schedule

- Manage the creation of professional email templates
- Establish your email publication schedule for content and promotions
- Review email content
- Manage emails being sent to the list
- Ensure emails are sent on schedule
- Manage your lists and segments
- Manage ads and other promotional material included in emails
- Coordinate with affiliate and JV partners for cross promotions

09 Manage Launches

- Set up a launch plan based on strategy from the business owner
- Ensure key team members are in place for each stage of the launch
- Establish a clear promotional schedule for each phase of the launch
- Work with a copywriter for launch materials, if necessary
- Work with affiliate partners
- Manage creation of the opt-in and sales pages
- Keep everyone on task and stay on top of any dropped balls
- Support the business owner throughout the launch
- Be on call during the launch for urgencies and changes
- Update all websites and marketing materials after the launch
- Ensure the offering itself is delivered as promised

10 Manage Affiliate Program

- Work with the business owner to establish details for the affiliate program
- Set up the affiliate program in the shopping cart
- Set up a resource page for affiliates
- Coordinate promotional materials for various promotions
- Keep in touch with affiliates about upcoming promotions
- Follow up with affiliates as needed to support their promotions
- Manage payment of affiliates

11 Manage JV Partnerships

- Create the project plan for JV partner projects
- Manage the implementation of any JV partner projects
- Coordinate with members of the JV partner's team
- Communicate key details to all players involved
- Follow up with JV partners and the business owner to bring the project to life

12 Manage Speaking Engagements

- Prepare the speaking kit
- Review speaking requests on behalf of the client
- Confirm details of the speaking agreement
- Coordinate details with the host
- Manage travel
- Prepare all speaking materials in advance
- Order any products to be sold on-site
- Manage onsite logistics, as required

13 Manage Marketing Implementation

- Manage day-to-day marketing implementation: paid advertising, audio/video, social media, email, affiliate, speaking, SEO, PR and offline marketing
- Establish a team to take care of ongoing marketing activities
- Review lead and sales funnels regularly for accuracy

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Manage AI Implementation

- Review business operations for AI opportunities
- Assess AI ethics policy and considerations
- Make strategic AI and automation recommendations
- Plan and manage AI, automation and human oversight setup and training
- Review AI, automation and human oversight regularly for updates

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Free Up the Business Owner

- Review where the business owner is spending their time
- Proactively take things off the business owner's plate they don't realise they can let go of
- Act as gatekeeper on behalf of the business owner
- Create an email management system for the business owner
- Set up a scheduling system for the business owner

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TASKS OFF YOUR PLATE

One hire. Countless hours back. Every task above is something you're either doing yourself right now, or not doing at all. An OBM picks up the whole list, so you can get back to the work that actually grows your business.

What Happens Next?

1

Book a free call. Tell me where your time is going and what's weighing you down.

2

The Ops Review. I start with a bird's eye view of your business and map out priorities for the first 90 days.

3

Hand it off. Your OBM takes the reins, so you can focus on growing your business.



READY WHEN YOU ARE

Stop Managing. Start **Growing.**

If you recognised yourself in this guide, it's time to hand over the day-to-day and get back to the work that lights you up. Book a free call and let's talk about what an OBM could take off your plate.

Book A Free Call