



Hey, I'm Sarah Noked!

Founder of OBM School

Thank you for downloading the Online Business Manager Starter Kit!

If you're looking to get your online business off the ground in the right way (without wasting tons of time and money in the process), level up your existing online service offerings, or if you're curious about how working as an OBM could transform your life, then you're in the right place!

The OBM Starter Kit will help you get clear on what an OBM is, what we do, and outlines my proven steps for kickstarting your own profitable online business. Over a decade of experience in the online space is packed inside this handy kit, and I've shared some of my juiciest tips to help you quickly gain momentum in the online space.



Let's Dive in!



What's an Online Business Manager?

OBMs step into a client's business to take some weight off of the business owner's shoulders! We utilize a range of soft and hard skills to support clients, working across areas like Operations, Team Management, Systems Support, Project Management, and more.

Check out the video below, where I'll walk you through exactly what an OBM is, what we do, and how we serve our clients:





Who We Work With

As a general rule, OBM clients have three key characteristics:

A Proven Business Model

Their business has been up and running for a while already, but they may be transitioning online or looking to streamline so that they can scale.

Delegation Mindset

The client has been wearing all the hats in their business for some time, but they know their time is better spent on higher level business activities, and they need help to make that happen. They may already have a small team, or looking to grow their team in order to delegate more responsibilities.

Consistent Revenue

The client has been consistently generating revenue for at least one year, and they have a decent budget to spend on investing in their business. They are making good money, but have hit a revenue ceiling because they're too busy doing everything themselves to expand on or create new streams of revenue. Which is why they need the help of an amazing OBM!



The OBM Digital Office Set Up


Putting the right tech tools into place is a crucial component of every OBM's digital office. Implementing tech in both yours and your clients' businesses will save tons of hours (and money!) each week by automating and systematizing key recurring processes within the company. That way, your time can be focused on revenue-generating activities that will encourage growth.

As the digital landscape is always evolving, and there are such a huge array of tools out there, the key is knowing which ones are right for your OBM biz, so that you're only using what's valuable to you. I've put together a list of my top tech tools for online service professionals.



Click here to access it now.

Here's a rundown of key areas in your business to consider when setting up your OBM virtual office.





PROJECT MANAGEMENT

At OBM School, our project management platform is the single most powerful tech tool that we couldn't live without! When it comes to staying organized, both in your own business and your clients' businesses, it's important to have a PM tool in place to centralize all projects & deliverables, save you tons of time, and help to ensure that the business operations run smoothly and efficiently. [Head here](#) to access my tech stack and see recommendations for PM tools to use in your biz.



TIME TRACKING

Logging time properly, under the right client, the right contractor, and for the correct duration, ensures that all work done on behalf of a client is properly accounted for and projects stay on budget. It also helps you to manage your time and workload more efficiently. Having a time tracking tool in place is also valuable for when you start to grow your own team, or outsource work to contractors.



INVOICING

Invoicing software is an essential tool when running your business. It allows you to send professional invoices to your various clients, easily keep track of company expenses, and increases overall efficiency of transactions. Many invoicing tools can be integrated with your time tracking tool, so that the entire process is automated, which will save you countless hours in the long run.



CLIENT/CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Having a buttoned-up client management experience will ensure that your potential clients feel taken care of from the word 'go!'. You can use CRM tools to send out email marketing, build web pages, contact management, lead management, and SO much more. BUT when just starting out, the main thing you need your CRM to do is manage your client intake process, prep sheets for discovery calls, and any notes/due diligence audits.





DOCUMENTATION

Our go-to is Google Suite - which can act as your simple CRM system as well when you're first starting out. It automatically backs up your documents to the cloud, and is a great low cost option for centralizing all of your documents and Standard Operating Procedures (SOPs).



COMMUNITY SUPPORT

I always emphasize the importance of having a solid support network as you start or scale your business. No entrepreneurial journey is straightforward, so finding your tribe, and learning from others who have been in your shoes, is crucial for maintaining motivation and momentum to accomplish your goals. Don't forget to join The Confident OBM® Community to access support from myself, our OBM Mentors, and thousands of other online service professionals!



MINDSET

Just as your mindset can skyrocket your success, it can also make your business come crashing down. It's important to overcome your inner critic, bust through any limiting beliefs, and understand that no matter what your current role, you have valuable skills that clients will pay you for! Lead with your strengths, build momentum doing what you feel most comfortable with first, and celebrate your wins (big or small!).

Want to learn more about the OBM School programs?
Check out our information session here: obmschool.com/info

Thank you for reading!



I hope you squeezed TONS of value from my OBM Starter Kit. Now it's time to start putting the pieces in place to build out your virtual office.

I'd love to support you further as you take your next steps in the online space!

For more tips, tools, and advice on how to maintain momentum on your OBM journey, and build a thriving online business as an online service professional, follow OBM School on social media via the clickable links below.

To your success,

Sarah Noked

Follow us on social:



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