



THE PERFECT *TECH STACK*

for Mid Tier Project Services Businesses

HI I'M SCOTT GELLATLY,



Hi, I'm Scott Gellatly, Founder of Scale My Empire, and I help Founders of fast growing Australian businesses to become more profitable, valuable and scalable.

Our team are experts at systems, technology and workflow automation.

The Perfect Tech Stack was crafted for services based companies that want a completely integrated set of platforms to run their business from.

This set of systems will help you make faster business decisions, improve productivity and save money by eliminating double handling and automating workflow.

Then this guide is for you if:

- You don't have visibility over your sales, projects and financials
- You don't know what tech platforms are right for your services business
- You need to automate and become more efficient

A large, stylized white handwritten signature of Scott Gellatly on a dark blue background. The signature is fluid and cursive, with a long horizontal stroke at the end.



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CONGRATULATIONS YOU ARE STARTING TO SCALE.

Your business has undergone enormous growth and the horizon is looking bright.

As you've grown however, the spreadsheets and old data bases that have driven your small team for so long are not able to cope. They are not connected and there is plenty of manual data entry required to keep everything up to date (not to mention your team don't like using them!)

You are finding you don't have the visibility over your sales, projects and financials that you need to make informed decisions.

As you start to grow your tech stack (or lack thereof) is becoming a liability that needs to be rectified fast.

But...

Where on earth do you start?

There are (literally) 20,000 CRM, Project Management and other services related software tools out there to choose from. Picking the right one for your business, plugging them into your ecosystem and getting the reporting outcomes you need seems impossible.

Well we've worked with 100's of services businesses and reviewed 100's more software tools to bring together the perfect 'tech stack' to run your services business.

So who is this for?

- Professional services consultants selling knowledge and expertise for money
- Marketing and IT agencies
- Engineering and project management firms

What criteria did we use to make the choices:

- Easy to use, beautiful user experiences that will make your team actually want to use them
- Single point of truth (CRM) that pushes out to all other systems. No duplication of data.
- Collaborative and bring people together rather than through up walls and create silo's.
- Have excellent reporting capabilities
- Cost effective for a small to mid tier business.



THE STACK

The tech sandwich that will run your business, plus some handy tools that will save you heaps of time (and thus improve your margin!).



GOOGLE APPS

Google provides what physical servers provided 10 years ago - your core business infrastructure.

This includes your email, word processing, spreadsheet, presentations and file storage. Essentially the baseline kit you need to function and communicate in modern business.



Migrating to Google from your old servers is a lot easier and cheaper than you think thanks to experts like **IT Genius**. The savings you'll make in not having physical infrastructure to look after will blow away the cost of implementation.

Alternative: Microsoft Office 365

The screenshot shows a Gmail inbox for 'SCALE MY EMPIRE'. The interface includes a search bar at the top with the label 'a-sg-to-do'. On the left, there's a sidebar with navigation links: 'COMPOSE', 'Inbox', 'Starred', 'Sent Mail', 'Drafts (116)', 'A SG To Do (13)', 'A SG To Read (12)', 'A VA To Do (1)', 'Accounts (39)', 'Add to PMO', 'Add to Podio', 'Automations', and 'Create Asana Task'. Below these are contact cards for Scott, Ken Shin, Alissa Masuda, Michael Benayour, and Carmen Martin. The main inbox area displays a list of emails with columns for checkboxes, stars, sender names, subject lines, and timestamps. The emails include messages from 'Simple Creative Marketin.', 'Christine Glydel Roda', 'Brian, Emma-Kate, me (9)', 'Anfernee Chansamooth', 'me, Shane (8)', 'ProsperWorks', and 'The Citrix SaaS Referral.'. On the right, there's a 'Person' card for 'KT' with an 'ADD TO PROSPERWORKS' button, and a 'Company Info' section with fields for Name, Outlook, and Website, along with a URL.

Sender	Subject	Time
Simple Creative Marketin.	SME Strategic Par... - +scott@scalemyempire.com	2:32 pm
Simple Creative Marke. (3)	Virtual CMO Plan ... - +scott@scalemyempire.com	2:26 pm
me, [redacted]	Summary of todays workshop - Great thanks mate, one thing i forgot to ask was	2:24 pm
[redacted]	proof of concept - Zoom Call - looking forward to speaking with you all Kxx	2:20 pm
[redacted]	Proof of concept - Zoom Call - 12th of October 2017 - Dear All, As discussed we	2:17 pm
Christine Glydel Roda	Assigned to You: Solidify Business Lines - assigned to you Ti	1:50 pm
Simple Creative Marketin.	Email template: Invitation to partner - Invitation to edit - anf@sim	1:49 pm
Christine Glydel Roda	Assigned to You: Update Partner List in ProsperWorks - cha	1:47 pm
Brian, Emma-Kate, me (9)	ProsperWorks Demo / Partner Introduction - fyi Forwarded message From: Emma-l	1:36 pm
Anfernee Chansamooth	Assigned to You: finalise tech stack list [Lead magnet: Ultir	1:33 pm
Anfernee Chansamooth	Assigned to You: lead list for partners [Partner Kit] - assigne	1:22 pm
me, Shane (8)	Podio Audit - Hi Scott, The MD has asked for some details regarding outcomes of	1:03 pm
ProsperWorks	Christine Roda Mentioned You In "Jessica Hill" - Christine Roda mentioned you	12:52 pm
ProsperWorks	"Jessica Hill" has been Assigned to You - October 5, 2017 "Jessica Hill" has been A	12:51 pm
The Citrix SaaS Referral.	Satisfaction Survey- Reminder - Hello, The Citrix SaaS Referral Partner Team w	4:00 am



PROSPERWORKS CRM



PROSPERWORKS

One of the 2 biggest challenges to scaling a services business is reducing your cost of sale and forecasting your revenue.

ProsperWorks CRM helps you achieve both and it's so simple your team will actually use it.

ProsperWorks integrates directly into Google Mail and allows you to seamlessly add new leads from within Gmail itself, as well as view your entire activity history, related contacts and manage your follow ups. Your sales people get to work where they spend their day - in gmail.

What's more, is that it vastly reduces the amount of data entry you need to do by scanning the internet for information on your contacts and prefilling interests and social links.

By reducing the time spent on data entry, keeping a history of all of your interactions and providing excellent pipeline and sales performance reports, ProsperWorks is setting you up for a high converting, low cost sales process that will be the driver to scale.

As they are backed by Google themselves (you'll find even the user interface is very similar), you know they are set to grow with you in confidence.

Even better, you can get started with a 14 day free trial!

Alternative: Base CRM



MAVENLINK

As a services business, you have 3 key metrics you need to keep on the pulse: **Average Billable Rate** (average amount you charge per hour across project), **Billable Utilisation** (% of your total hours spent on billable work) and **Per Job Margin** (profit on each job).

Mavenlink reports on all 3 and it's a beautiful, collaborative project management system that your team will actually use.

Mavenlink is the first project management system to tie together team collaboration with advanced budget management, gantt charting, resource management and timesheets into a simple interface that both your team and your clients will love.



When integrated to Xero or Netsuite, Mavenlink can generate your services invoices at the click of a button that ensure you never miss a client bill.

Suitable for all services businesses from marketing, IT, professional services and engineering,

Mavenlink is the gold standard for agency project management.

[Check it out here or contact us for a walkthrough.](#)

Alternative: Accelo

A screenshot of the Mavenlink 'Task Tracker' interface. The left sidebar contains a navigation menu with options: DASHBOARD, PROJECTS, TEMPLATES, TASKS, TIME & EXPENSE, BILLING, PLANNING, ANALYTICS, INSIGHTS, and SETTINGS. The main content area has a search bar at the top with the text 'Search for a post in [ASSO] Funding Workflow System'. Below this are tabs for Activity, Task Tracker (selected), Gantt, Time & Expenses, Resource Planner, and Files. The 'Task Tracker' tab shows a 'Task Finances' section with a search bar and filters. Below this is a table with columns: TYPE, TITLE, ASSIGNEES, STATUS, ACTUAL, EST. BUDGET, INVOICED, EST. HOURS, DUE, and ACTIONS. The table lists several tasks, including 'Discovery', 'Phase 1 - MVP', 'Sprint 1 - Initial Design', 'Sprint 2 - Build and Release', 'Release 1', and 'Implementation Project Release 2'. The 'Discovery' task is marked as 'Started' with a green progress bar. The other tasks are marked as 'Not Started'. The interface also includes a 'Track Time' button, a 'Support' dropdown, and a user profile for Scott Gellatly.

XERO

Core to any services business is the ability to pay and get paid. **Xero's 'beautiful accounting' package makes financials easy for anyone with a simple interface and easy reporting.** You'll know what you have to pay and what you are going to be paid in a simple view that will help you forecast your cash flow and make smarter spending decisions.

While it reduces the time and cost involved in accounting and payroll for your business, the real power is in the automated follow



up sequences. These sequences will automatically remind your clients to pay on your invoices, setting your accounts receivable on 'auto-pilot' and reducing the time to pay dramatically.

Xero is the de-facto standard for small business - check it out [here](#).

Alternative: Netsuite

(needed for larger businesses with HR needs).

A screenshot of the Xero website. The header is dark blue with the Xero logo and tagline "Beautiful accounting software" on the left. On the right are buttons for "Free trial" and "Login", and a search bar. Below the header is a navigation menu with links: "Features & tools", "Why Xero", "Pricing", "Find an advisor", "Resources", and "Partners". The main hero section has a blue background. On the left, it says "Xero is online accounting software for your small business" with a link "See why over 1 million subscribers choose Xero". Below this are buttons for "Try Xero for free" and "Learn more" with a play icon. On the right, there is an image of a tablet and a smartphone displaying the Xero software interface.



KLIPFOLIO



As Founder, keeping your finger on the pulse of key metrics is critical. But having multiple platforms means that your reporting is decentralised and it can be difficult to pull insights across them.

Klipfolio sits across all of your platforms pulling out intelligent insights that your PSA can be measured against.

For instance, you might combine a sales dashboard from ProsperWorks indicating potential revenue over time with actual cash flow from Xero. You can also create reports from the base data that are not available in source platform, such as revenue by region, product line or account manager.

Klipfolio brings all of your data to a central nexus to improve your decision making.

Alternative: Grow.com



SLACK



Keeping track of your discussions and notifications across a diverse tech stack is the challenge Slack has sought to solve.

Through its intuitive, easy to use interface you can hook Slack up to almost all of your tech stack (or use Zapier to hook up the rest - see below!) so you have ONE single place to go to see all of the activity across your business.

With its built chat and video calls, Slack becomes the nexus point that your team meet and collaborate together as well.

Even better, it's free! [Check out Slack here.](#)

Alternatives: Microsoft Teams

A screenshot of the Slack web interface. The window title is "Slack - Scale My Empire". The left sidebar shows a list of channels under "Scale My Empire", including #pmo, #christine (with a red notification badge), #accounts, #crecentech, #hrs, #marlon, #marvin, #mavenxero-integration, #maxreturns, #operations, #random, and #sales (highlighted in green). Below the channels are direct messages to slackbot, scottg (you), and carl. The main area shows the #sales channel with a message from ProsperWorks, Inc. at 10:15 AM containing a table of sales data. The table has columns for amount, company, updated stage, close date, and pipeline. A subsequent message at 10:16 AM shows a stage advancement. A message from the ProsperWorks app at 12:50 PM states "New Lead created".

	Company	Updated Stage	Close Date	Pipeline
\$20,000.00	[redacted]	Book for workshop	November 16, 2017	SME

ProsperWorks, Inc. | Today at 10:15 AM

[redacted] stage advanced from **Qualified** to **Book for workshop**

	Company	Updated Stage	Owner
[redacted]	Vine Digital	Book for workshop	Scott Gellatly

ProsperWorks, Inc. | Today at 10:16 AM

ProsperWorks APP 12:50 PM
New Lead created

	Company	Owner
[redacted]	DataMinds	Scott Gellatly



GOOGLE SITES

Tying together all of your systems is Google Sites.

Google Sites is your 'intranet' where you can post up your processes, procedures and admin forms for the business.

Using Google Forms and integrating them into the site, it can also be a portal for your team to make requests (e.g. a travel request process) and add information to various registers (e.g. a subscriptions register).



We use it to communicate our vision, mission and values as well as onboard new project managers to the team. They certainly appreciate having one place to learn everything they need to know when coming on board.

Oh and It's completely free with your Google Suite! Check it out.

Alternative: System Hub

A screenshot of a Google Sites page for 'The PMO'. The page has a dark navigation bar at the top with a logo and the text 'The PMO'. To the right of the logo are links: 'Home', 'SME' with a dropdown arrow, 'Process' with a dropdown arrow, 'Platforms', 'People', 'Knowledge Base' with a dropdown arrow, and 'Forms' with a dropdown arrow. A search icon is on the far right. The main content area has a background image of clouds. The title 'Why are we here?' is centered in a large, dark font. Below the title, there is a paragraph: 'It's the most important question you can ask yourself. By understanding what change we want to make in the world and the way in which we want to conduct ourselves in making that change, we create alignment of our skills, attitude and the customer experience. So read on. If this resonates with you, then you're in the right place.' Below this is a section titled 'Our Vision' in a dark blue font, followed by the text 'To create a world where humankind is empowered to follow their passion and live as best and highest selves.' Below that is a section titled 'Our Mission' in a dark blue font, followed by the text 'SME must achieve 2 missions to contribute to its vision:'.

The PMO

Home SME ▾ Process ▾ Platforms People Knowledge Base ▾ Forms ▾

Why are we here?

It's the most important question you can ask yourself.

By understanding what change we want to make in the world and the way in which we want to conduct ourselves in making that change, we create alignment of our skills, attitude and the customer experience.

So read on.

If this resonates with you, then you're in the right place.

Our Vision

To create a world where humankind is empowered to follow their passion and live as best and highest selves.

Our Mission

SME must achieve 2 missions to contribute to its vision:



TIEING IT ALL TOGETHER

Tieing our dream platform together is the the King of Integration Platforms, Zapier.



Zapier connects all of your platforms together to trade contacts, trigger tasks, generate emails, create projects... the list goes on.

We have at least 20 'zaps' pushing information across our tech stack. Naturally, your CRM drives most of workflow across your tech stack, so here's one little example of what we do with Zapier.

When a new Opportunity is won in ProsperWorks:

- Create a new project in Mavenlink
- Create a new channel in Slack for the project
- Post in the Slack team channel that a new job is won
- Create a new client in Xero

Zapier is the glue that holds this tech stack together.

There are alternatives and complementary products (Piesync is definitely worth a look for syncing contacts across all of your platforms), but Zapier is the master.

HONOURABLE MENTIONS

There are a so many little tools in our kit it's hard to show them all off. But there are a few honourable mentions we'd like to add. They aren't core, but I'm not sure how we'd live without them.



A presentation and contract management system with e-signature that integrates seamlessly with ProsperWorks CRM.



A video library that can hold all of your internal team processes, sales demo's and records of all of your customer calls.



Say it faster with video. This neat tool saves a lot of typing. Don't hesitate a moment and Use Loom to save yourself an hour of typing a day.



Decouple your team from their desks and save a lot of time and money on meeting with your prospects and clients at the same time. Zoom video conferencing pays for itself a million times over and allows me to meet my clients anywhere in the world.



Save hours on back the back and forth trying to book a meeting in with your prospects. Just give them a calendly link and they can pick a time that suits them it is integrates directly into your calendar.



I HOPE YOU FOUND THIS GUIDE USEFUL

As mentioned at the beginning, this **Ultimate Tech Stack** is responsible for helping our clients and our team make better business decisions, improve productivity, and save money (thereby increasing margins) through eliminating inefficiencies.

We're confident that by utilising these tools for your business as well that you'll be able to get similar results.

**Want some help to create profit,
impact, and lifestyle through building
better systems and a high performing
team for your business?**

**BOOK A COMPLIMENTARY 15-MIN
"SCALE MY EMPIRE" CONSULTATION
WITH SCOTT GELLATLY TODAY**



ABOUT SCOTT GELLATLY & SCALE MY EMPIRE

Scott developed his reputation as world leading cloud technology implementer and small business enabler in his previous businesses, Bollo Empire and TrackZEN. He's now taking his roots in enterprise architecture and project management and bringing it to his passion for helping Founders to scale their business.





SCALEMYEMPIRE.COM