



# Professional Services Action Plan



Constant Contact

**If you're feeling overwhelmed and unsure of what actions to take during this time, use this guide to get you started. Here's what we'll cover:**

**Keeping safe**

- Protecting yourself
- Protecting your clients

**Assessing and generating solutions**

- Identifying short-term modifications
- Starting to think long term

**Adapting and overcoming**

- Converting to digital solutions
- Putting a plan into action

**Staying in contact**

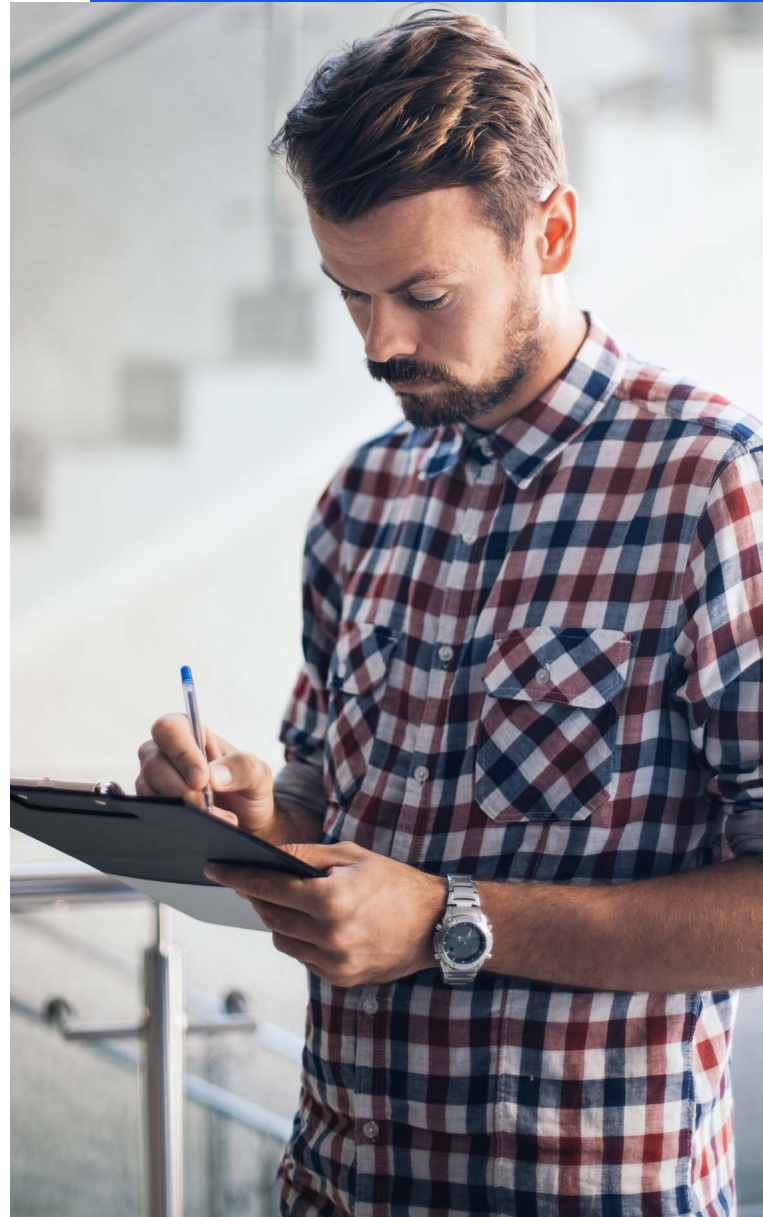
- Updating your communication channels
- Reaching out to clients and partners

**Marketing during this time**

- Being sensitive and respectful
- Gauging the appropriate path

**Planning for the future**

- Thinking ahead
- Using what you've learned



The COVID-19 (coronavirus) pandemic is changing the way we all do business. There is much we still don't know about how this situation will play out.

As this unprecedented crisis continues to evolve, many professional service providers are wondering how to minimize losses, and what steps they can take to protect their businesses. Your clients may be looking to you to offer guidance and training on how to adapt their businesses and approach their communications with customers and employees during this time.

Small business owners and entrepreneurs are some of the most resourceful and resilient people we know. And now's the time to lean into that resourcefulness, make a plan, and get to work. If you're feeling overwhelmed and unsure of what actions to take, this guide will serve as a good starting point.

Let's take a look at some ways that you can take stock of the situation, generate solutions, and take action to protect your business.

As you know, things are developing rapidly. Remain flexible to make changes on the fly.

Remember, you've got us and can get [Constant Contact Help and Support](#) when you need it.





# Safety First

Your first priority is to make sure that your family, staff, and especially yourself, are safe and safeguarded, to the best of your ability.

Next, make sure that you're doing everything you can to safeguard your clients.

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Implement [CDC-recommended precautions](#) in your business as soon as possible. Among the most important recommendations are:

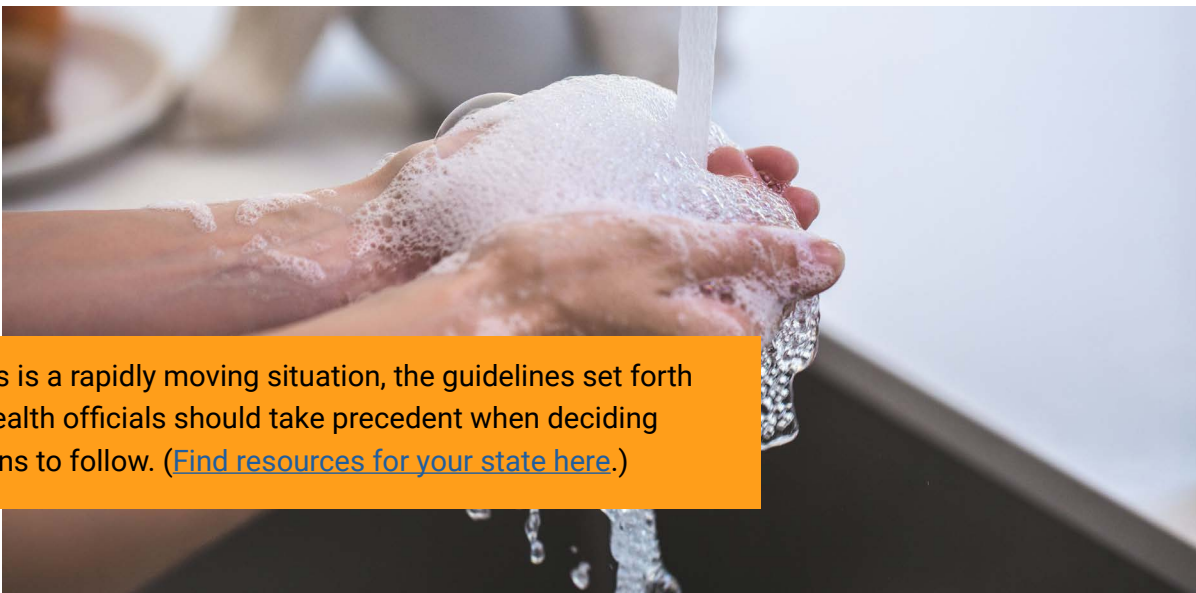


- ☐ **Actively encourage employees, especially those who are sick, to stay home.**
- ☐ **Implement systems that allow them to work from home if possible.**
- ☐ **Emphasize the importance of cough and sneeze etiquette as well as hand hygiene within your business.**
- ☐ **Perform routine, thorough environmental cleaning.**

You can also review OSHA's [Guidance on Preparing Workplaces for COVID-19](#).

Once you've done what you can for everyone's health and safety, it's time to figure out how this situation may affect your business.

It's likely you're already feeling the impact. In any emergency, large or small, you'll often have to assess and reassess to generate solutions because things are always changing.



**Note:** Since this is a rapidly moving situation, the guidelines set forth by your local health officials should take precedent when deciding what precautions to follow. ([Find resources for your state here.](#))

# Assess and generate solutions

Since there are a lot of unknowns, it's important to think about various possibilities and what you can do to adapt to them. The problems you face will vary depending on the nature of your business, and so your solutions will vary too. The primary concerns that we hear those providing professional services struggling with are how to remain in contact with their clients as well as how to make sure they are providing them with the best and most up-to-date information possible.

Needless to say, the stay-at-home nature of this crisis has changed the way many of us, especially those in the professional services industry, are doing business at this time. Namely, business is being done virtually — a change that could greatly influence the industry moving forward, if it hasn't already.

It's important to look at the struggles you're experiencing directly and to make a plan based on what you're able to do now, as well as what you might be able to do later on. Here are some examples of things you should consider.

You may want to write things down as you think through these questions and your answers. It'll help you formulate your action plan.

## Will you or can you keep your doors open to the public?

- ☐ For some of you, this may not be a choice due to government regulations.
- ☐ For others, it may be about keeping yourself and your staff safe and healthy. If you have the option, think about having your staff work from home.

## If you're closing your doors to the public, are there other ways you can still do business?

- ☐ How can you move your current appointments and general services online?
- ☐ Can you create content for your website or social media accounts to allow your clients to still take advantage of your know-how and guidance during this time?

## What can you do to help support your current clients?

- ☐ Think about reaching out to them proactively with your assessment of the industry during this situation, your recommendations on how to proceed (even if it's just to hang tight until more is known about this crisis), and any other must-know advice they could use right now.

## How will you respond to inquiries from potential customers or clients during this time?

- ☐ Consider formulating a response ahead of time that you can copy and paste into an email that lays out what you currently know about your business and how it will be affected.
- ☐ It's very possible you'll want to implement special guidelines in response to this situation that are different from your normal everyday policies.

## What if you get sick?

- ☐ If possible, designate someone else to be in charge of your daily operations.

**And at some point you may have to ask the bigger questions:**

**Is the “temporary” plan you put into place sustainable? If so, for how long?**

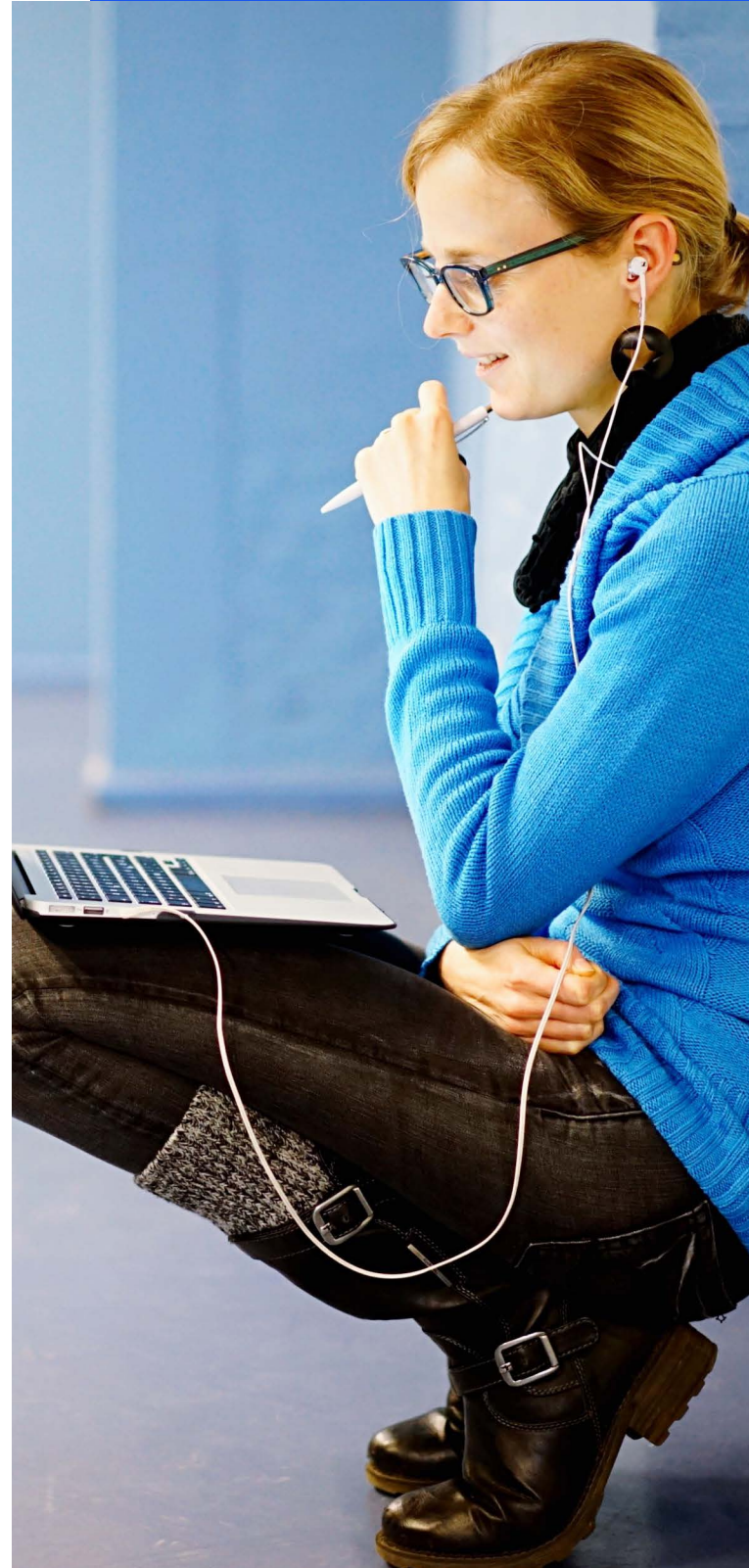
- If not, are there things you can do to adjust your plan so it will be sustainable?

**What if this lasts several months?**

- How this would affect your family, as well as your staff and their families – can you help them in some way?

**Are there any other resources available to you?**

- We’ve compiled a list of resources for you: [Resources for Small Businesses Impacted by COVID-19 \(Coronavirus\)](#)





# Adapt and overcome

Your “business as usual” may no longer exist, at least for the time being. You’ll need to adapt to get through these trying times. Some things to consider:



## Working from home

If you can, set up work from home options for yourself and your employees, if you have any.

Set up a workstation that can stay in place for as long as you need it. Create a space where everyone in the family knows that if you’re in it, you’re working. This can help you to stay focused when you’re working and set up boundaries between working and hanging out at home.

## Building your brand online

Your Constant Contact account comes with tools that make it easy to start building your brand online. You can create a logo, a full website where you can share updates and information about products and services, and manage your social media accounts.





## Moving in-person events online

There are plenty of ways for you to connect with clients or customers via phone or video call. You can also find platforms that allow you to hold virtual events such as seminars or classes. You may even consider a YouTube channel, video conferencing, or livestreaming. Adapt your training for people working from home rather than in-person.

Once you have a game plan to adapt your usual business operations, you'll need to let people know about it.

## Making sure vital services are still available

As a professional services business, you may be providing financial, legal, accounting, IT, or design services for your clients that are vital at this time. Do you have the tools in place to continue supporting your clients even if you and your team are remote? If not, how will you convey this to your clients and help them in finding an interim solution?





# Stay in contact

When you're constantly having to make changes to adapt to an ever-changing situation, it's imperative that you let your clients know what you're doing and when. Keep them aware of any changes to day-to-day operations.

Be sure to include details your clients should know about, like your availability, the options available to them, and any precautions you're taking regarding the virus.

Consider the following tips to communicate the above information with your clients:



☐ **Update your website.**

☐ **Email your current clients or customers.**

☐ **Post to social channels and pin those posts to the top of your feed if possible.**

☐ **Update your details on your Google My Business profile and any other sites where you have a listing.**

☐ **If you have a physical location, think about hanging signage in your windows and around the office.**

It's also a good idea to review any communications you already had scheduled for their appropriateness and relevance based on the current state of affairs.

Remember, your Constant Contact account comes with tools to create a website, send email (including templates for you to communicate with your contacts about COVID-19 including tips on what to say), post to social media, and more. Need help? See our other resources for [Constant Contact Help and Support](#).





# Marketing during this time

Yes, it's okay to market your business during this time. But you must be sensitive to the current situation and respectful of your audience and the situation they are also going through. Letting people know about the changes you've made is a great place to start. Use the channels mentioned above to communicate on a consistent basis. Of course, consider your unique situation to gauge the most appropriate path forward.

## Keep up

Make sure to keep all of your sites up to date. This means regular updates on industry changes and government regulations on your website, social media accounts, review sites, and business listings.

## Fill the gap

While many people are adhering to social distancing regulations and stay-at-home orders, they may find themselves needing your services now more than ever. Make sure that in addition to COVID-related information on your website you also have detailed information regarding your services. Consider including a menu of sorts, outlining each of your offerings, how you are providing them at this time — whether virtually or over the phone — as well as prices. This will help not only your current clients but also prospective ones get the information they need.

## Be social (but at a distance)

Social media is where everyone is spending their time right now, so use it to your advantage. Consider posting a tax minimization strategy video on YouTube, share a client success story on your website, or share tips for dealing with investments during this time..

Whatever it is that you decide to put out there during this crisis, make sure that your content is sensitive to the current situation — with a positive attitude toward how you are helping clients get through this and how the future is bright.

# Plan for the future

Eventually, you'll need to transition back to business as usual. It's important to plan ahead. So, start making plans for what comes after the emergency.

Review the changes you've made and what you've learned, then think about how you can use that information to move forward.

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## What can stay?

Look for things worth making a permanent part of your business.



- ☐ Did your new hours of operation work better than the old hours?
- ☐ Were you able to make headway building your personal brand?
- ☐ Did you discover some advantages to your work from home policy?
- ☐ Were people interested in the content and messages you produced about the industry?
- ☐ Did you come up with some industry innovations that worked surprisingly well?

If so, don't stop just because the emergency is over. Keep them going and see if they're a good addition to your business long term.

## What comes next?



- ☐ Do you need to check on the status of others in your industry in order to get your own affairs back in order and running smoothly?
- ☐ If you've paused operations, what will it take to start back up?
- ☐ How will you recall your staff? Will it be in stages or all at once?

These are trying times with many unknowns. By doing your best to stay safe, review your options, and make a plan you'll better position yourself to come out on the other side.



# Remember, you are not alone

Our marketing advisors are here to help.

- Connect with other small businesses in the [Community](#)
- See our other resources for [Constant Contact Help and Support](#)
- Read *The Download*, our [ultimate online marketing guide for professional services](#)

**You've got this. You've got us.**

