



Virtual Business Management & Support

A large, irregular yellow brushstroke shape with a rough, textured edge, serving as a background for the main title text. A dark blue brushstroke is visible at the bottom left of this yellow shape.


New Client
Welcome
Packet

patti@bizmagic.co
<https://bizmagic.co>



YAY! The BizMagic team is so excited you have chosen to partner with us for your Virtual Business Management and Support needs. We are committed to helping you take your business to the next level while creating more time in your days to focus on your zone of genius.

BizMagic is an LLC based in Frisco, TX, founded by Patti Meyer (whose true heart is in San Francisco). We are run by an amazing team of women who are based all over the world.



The purpose of this welcome packet is to get you acquainted with BizMagic's business operations including typical business hours, turnaround times, and methods of communication. You'll also learn how our team works with you, what to expect from us, and what we expect from you.

If you have any questions about this packet or how things work at BizMagic, feel free to reach out any time by email.

We recommend you keep this packet handy so you can easily refer back to it as we build our magical business relationship.

And with that, we'll keep this short and sweet as your time is precious. Let's get the ball rolling!

Contact Methods & Information

As mentioned in your consultation call, you'll soon be introduced to your Client Manager (CM) and they will be your main contact person for all of your tasks and projects. However, you are welcome to email Patti at any time if you have feedback about your work with BizMagic or if you have any issues with your CM. Aside from Patti and your CM, you may also occasionally receive communications from other BizMagic team members. Those emails will always come from a bizmagic.co domain unless otherwise stated. (Want to get a bit acquainted with the team? [Click here.](#))

Should you need to contact Patti directly, you can reach her at:
patti@bizmagic.co

If you need to reach another member of the BizMagic team who is not your CM, you can always directly email: *admin@bizmagic.co*

Additional Methods of Contact:

Voxer

Slack

Text (in some cases, upon request)

Reach out to your Client Manager or Patti for specific contact information.



What You Can Expect from the BizMagic Team

Hours and Response Time

While we are a remote team, we mostly observe standard business hours – roughly Monday through Friday 9a-7p EST or so and we occasionally work on weekends as well (though weekend work is not guaranteed). Check with your CM for their typical business hours. Please note that, as we are all independent contractors, our hours will vary but most of us have general business hours. Our goal is to get back to any communication from you within 24 business hours.

The BizMagic team also observes all [federal U.S. holidays](#).

Scheduling Meetings

Your Client Manager is regularly available for check-in meetings with you as needed at your regular contract rate (or will use time from your retainer). You can find the scheduling links for your CM on the Clients page on the website at: <https://bizmagic.co/clients>.

Again, Patti is always more than happy to connect with you over Zoom or phone to discuss higher level strategy in your business or as a sounding board for your ideas. These meetings are subject to availability. These sessions are \$125 each. You can schedule yourself anytime you'd like by [clicking here](#). If you are a retainer client, you will also receive one session per quarter at your regular rate. As not all clients desire this, we leave it to you to schedule your quarterly strategy session by emailing Patti directly.



Scheduling Meetings (cont.)

Please note, Patti does not have meetings on Fridays or on the 3rd week of each month, though she will be working and fully available via all contact avenues during those times. Refer to the BizMagic calendar on the [Clients page](#) on the website for exact dark meeting dates.

To stay connected between meetings, we recommend downloading a free app called Voxer. It allows you to connect directly with your CM or Patti via voice anytime. Ask your CM directly for their Voxer username. The same 24 business hours response time applies to Voxer messages as well.

Project Management

BizMagic encourages the use of a Project Management tool. If you are not currently using a PM tool, we may request that you use one while working with us. You can choose one that fits the way you best work. Your Client Manager will be more than happy to help you find one that is the perfect fit. (Note: This is not a requirement. However, sometimes it can make working with support a bit easier.)

If you are already using a Project Management tool, just let us know and we'll happily use whatever you currently have in place. We are very flexible!



Project/Task Turnaround

In most cases, you can expect tasks to be completed between 48 and 72 hours after they have been requested. We will ask you if you have a deadline so we can plan accordingly. For larger projects, this time may increase to a week or more depending on its size. We will let you know if there will be a larger than expected time delay.

You are more than welcome to request faster turn arounds in urgent situations. While we can't guarantee a same-day turn around, we will absolutely try to help you in those situations if at all possible.

Payment Information

Payment information will be given to you in the email for each invoice. The payment options are Stripe, PayPal, or Zelle bank payment.

Late Payments:

If your payment is received three (3) days past an invoice's due date without contacting us to discuss extenuating circumstances, you'll be charged 1% of the total invoice amount for each day the payment is late. That being said, late payments happen, and, as a fellow small business, we understand that sometimes things are beyond your control. Communication is key! If you have a situation, please reach out as we get it and are flexible.

What We Expect From You

Communication

Our relationship with each and every client is incredibly important to us. That is why we request that you maintain clear and open communication with your Client Manager and the BizMagic team.

Part of this communication will be letting us know as much as you can about what your wants and needs are in your business. While our job will be to ask the right questions, there may be specific things that you want, and we request that you be open about them so we can best serve you.

We also request that you are always honest with your feedback! Especially in the beginning, it takes time for us to get to know you, your business, your voice, etc., so we may not get everything right out the gate. Because of this, we request that you let us know when you don't like a design we create for you or if we're not properly capturing your voice, etc. We don't take it personally! We take it only as a learning experience and a way to get to know you better.

Likewise, if you are unhappy for any reason with your experience with BizMagic or a specific team member, please let your CM or Patti know ASAP so they can address this issue. Your happiness and satisfaction in our work is important to the entire team.



Meetings

When you schedule a meeting with a BizMagic team member, it is expected that you will show up via phone or Zoom on time to the meeting. If you are running behind or will be unable to attend a scheduled meeting last minute, please text or message your CM to let her know. If we do not hear from you, you will be charged (or the time will be deducted from your retainer) for the meeting or for the time you are late.

Courtesy and Respect

At BizMagic, we have deep respect not only for our clients, but also for our team members. As such, if a situation occurs for any reason where you are displeased with a task, a timeline, etc., or if you are feeling frustration around a situation, we expect you to be able to maintain your composure and treat all BizMagic team members, including its CEO and Client Managers, with kindness and respect.

Should you treat anyone in a disrespectful way, using unsavory words, speaking condescendingly, or raising your voice, your contract with BizMagic will be terminated immediately and we will not complete any outstanding tasks or projects.

Alignment

All BizMagic team members are in full alignment with BizMagic's Mission, Vision, and Core Values. If you have not had a chance to view them, we encourage you to do so to ensure you are equally in alignment with our path. You can read them by [clicking here](#).

Referrals

As BizMagic continues to grow, we welcome referrals. For each person you send our way who signs with us or purchases a service, you will receive 2 free hours of BizMagic's time (hours are not exchangeable for money). When this happens, we will let you know that you have two hours "in the bank," and these hours do not expire.

Thank you in advance for any referrals!



THANK YOU!

Thank you for taking the time to read through this welcome packet. If you have any questions at all, please don't hesitate to reach out to Patti at any of the communication avenues listed in this document.

We look forward to working with you and helping you bring the Magic into your Business!

