



Becoming a profitable mompreneur - how vcita made it happen for this marketing guru



When the housing bubble of 2008 popped, Jessica's position as a real estate attorney took a huge hit. With a newborn baby in tow, she quickly realized she needed to reevaluate her priorities and assess new career options. After dabbling in eCommerce for a time, she decided to refocus her passions. This led her to attending a marketing academy and in 2015, she launched her own marketing firm.

When she started, she had two main goals, one was to have the freedom and flexibility to choose her own schedule and the other was to be able to be a "present" mother to her children. No an easy feat for any person, but Jessica managed to achieve her goals in a very short time.

This is the story of Jessica and her successful company, [Marketing For Greatness](#).

Today, Jessica is an influencer in Austin, Texas, and was recently named as Austin's top Women to Watch. As a first-generation immigrant and professional, her story has been featured at several events, showcased on talk shows, and profiled in multiple publications.

Being an entrepreneur gives me the luxury and the privilege to design my day. When you put locks around the time you know is precious, then nobody else will take it! That's what vcita gave me.

CHALLENGE

Creating and sustaining a true work-life balance

When Jessica launched in 2015, she was knee-deep in motherhood and struggled with simple business tasks like answering her phone at all hours (lest a child be screaming in the background). She needed to establish work-home boundaries while still maintaining her professional image with clients.

With big ambitions, Jessica understood that automated tools were a necessity and sought a platform that integrated with her existing accounting and project management software programs.

She discovered more "wants" as her business developed. Jessica began to host group events with over 100 people in attendance. Sending a Zoom link just wasn't enough to manage all the details associated with such feats.

Jessica needed confirmations, she needed to assign homework while making sure they all had the correct details. All this was too difficult without automation.

SOLUTION

Achieving equilibrium with vcita's automation tools

From the outset vcita quickly became Jessica's **trusty virtual assistant**, handling bookkeeping, campaign management, scheduling, and communications.



Billing and payment

Jessica relies on vcita for all her billing and estimates. For high-end contracts (especially B2B), she uses vcita's **estimates' tool and templates** to prepare purchase orders and create invoices.

In addition, she synched her billing with Quickbooks, her accounting platform, and can now see all payments and invoices in one consolidated place.

When clients pay, vcita even sends automatic and branded notifications. And with automated billing and payments, she has streamlined her financial processes, letting vcita's automation do the work.



Email campaigns

Jessica's clients come from many different sources and by the time prospects book a call through vcita, they're considered warm leads. Using vcita, Jessica assigns these leads into different segments and creates **automatic messaging** tailored to their place in the pipeline. When her prospects switch categories, the contacts are placed in another pipeline and are automatically assigned new tasks in vcita.

With all of her prospects and client information stored in **vcita's CRM**, Jessica can easily "pop" out postcards for additional messaging or start a new campaign.



Managing group events

When Jessica expanded and began offering more group events, training, and courses, she integrated the **group registration** feature. Each person who registers receives an automated response message with instructions and confirmation.

During events, she can also share documents and links within vcita for her students and clients.



Branding

Jessica integrated and applied her branding to different types of forms including dedicated intake forms.

She also customized every email, every signature, and all messages. Her **portal** is branded with her logo, her colors, and her "vibe."

I like the flow that I can have throughout the prospecting process. If someone asks for more details about services, I add them as a contact and then exchange communication through my portal! They then book with me proactively! I don't have to do a thing!

RESULTS

Clear boundaries and professionalism

For the last 5 years, Jessica has run her entire business from A-Z on vcita from both her app and her desktop.

Her customers' journey and onboarding are led and managed by vcita. With messages that engage, such as "It's time to book your discovery call! It's time to book your strategy call!"

Prospects and clients now proactively book Jessica, and she doesn't have to lift a finger. Once a notification lands in her inbox, she simply adds the prospect to her contacts and begins communicating with them.

Managing four kids and a staff of five, Jessica learned that time management was her top priority. vcita's automated platform enabled her to implement the boundaries that she needed.