

IW 2026_Day 2_Simplified Systems Lab_Topical Training_Transcript

[00:00:01:07 - 00:01:37:21]

All right, so welcome in today. Our lab is called, this is a topical training and it's called the Simplified Systems Lab. And so what this is, it's actually a training that I did inside of the action-driven collective earlier, like sometime last year, I think. And it's one of my most well-received trainings because a lot of people are looking at how do I organize my business better? How do I set up the backend? How do I get my systems in order so that then I can focus on the things that are gonna move my business forward? And so that's what we're gonna be doing here today. And so you see this folder, I probably should just move it from this, but this is like everything that we went through in the Simplified Systems Lab. We don't have that much time today, so we're not going through all of it. You're going to get a couple resources today. If you want the full thing, I have all of the resources, all the templates inside the action-driven collective, which is our membership. Everything that we're doing this week is what we do right inside there. So if you go through, if we go through everything today and you're like, "Ooh, I want all of that. I want more than what I got today. Come join us in there. I'm just giving you what I can." It's kind of like a brief snippet of what we do. So that's what this folder is. And I'll show you each of the templates and the different things. We're not going to be going through the FAQs, the SOPs, things like that today. I really want it focused on, "You worked through your 90-day plan yesterday." So what we're doing here is we're setting up that 90-day plan in a system so that you're ready to go.

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Also, I saw that you all have different kinds of favorite drinks. Mine would be, well, I actually, I don't like coffee at all. Anyone else, not a coffee drinker. Like, I can't stand the smell or taste of it. I wish I did. I tried it in all different ways, but I like to drink matcha. That's become my new favorite thing. And our roommate was in Japan this last couple of weeks and he brought back authentic matcha for me. And I was so excited. So I'm loving it. It actually tastes really, really good. I put a little cinnamon in there and a little honey, and it's just awesome.

[00:02:11:07 - 00:02:17:11]

Ooh, Catherine, you don't like it either? Or maybe you don't like it? Okay, I don't feel so alone. So thank you for not making me feel alone.

[00:02:18:12 - 00:05:35:01]

All right, the schedule page also, if you don't have the schedule page for implementation week already, if you don't mind popping that into the chat rich, make sure to bookmark it. It has the link so that you can add all the live events to your preferred calendar. All the live events are the same exact link every day. It's at the same time. So this time every single day. The reason I did it at this time as well is because inside of the collective, our live events are once a week and

they're on Tuesdays at this time. So if this time works for you, then you might be able to hit up some of the live events inside the collective. There's also the link to join the Pop-Up Slack community. If you haven't joined us inside the community, we're having a great time in there. You all are so engaged. Thank you so much for being in there. Thank you for popping in your introductions, who you are, your goals for the week, all the things. We also have the drop-in coaching channel, which I can pop here. I'll just show you really quick since I'm sharing my screen. This drop-in coaching channel, this is for you. So as you're working on things this week, if you have a question, if you need help with anything, if you want us to review something quickly, you can pop it in here. I love Slack because you can share a quick audio, you can share a quick screen share, you can do text, and it just really does kind of, it's a lot of stuff going on in here. So you might feel like it's really busy right now, but it is organized into different channels, which is really great. So pop any questions that you have. The one thing that we ask when you're in the drop-in coaching section is to have one post per specific question. So for example, don't ask like three questions all in one unless it's all related to like the specific question you want answered. Give us some context and then let us know what is it that you really need help with? What is the main question that you have? It just helps us to be able to help you a little bit better and to kind of know what it is that you need from us. And then also if you have something to review, you can just pop it in there as well. So that's kind of what this is all about. There's also the introductions, the introductions channel. I love it to be a connections channel too. So as you're getting to know each other, it could be a great place to collaborate, find some other people to collaborate, businesses that compliment yours, people who are in the same season as you are, those kinds of things, find your business besties. And just a reminder, this pop-up group is going to be open through the end of May. So for the full week, you're gonna get drop-in coaching with me and Rich. You'll have access to everything. And then we're gonna keep it open the next week so that we can tie up loose ends, help with anything that you need. You can get your connections. So if you're connecting with anyone in here, grab their contact information. This group will close, but we will be doing the same exact thing inside the action-driven collective. So if you're like having a great time, you're feeling very engaged, you love the live events, you love what's been going on, you love the drop-in coaching, then you can come join us in the collective after the week is over.

[00:05:36:12 - 00:05:47:11]

So, yeah, no problem, Katherine. I think I popped that in Slack for you as well. So that's what we're doing inside the Slack group today. So the first thing I want to work on,

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here's the agenda we're gonna go through. So the Simplified Systems Lab has a lot of different things. So I'm gonna show you a master Google organization folder, kind of how to organize your assets and things like that.

[00:06:04:02 - 00:06:17:23]

And so, yeah, there isn't a Google link for this. We're gonna pop some links in the chat for you as we go, things that I think would be really helpful for you, but I'm just sharing my screen. I'm

showing you the back end of setting up your systems.

[00:06:19:07 - 00:07:25:16]

So we're gonna do that. And then what we're gonna do is we're gonna go into, I'm gonna show you the master links spreadsheet, like your hub, and you're gonna get access to this today. It's very detailed. I think it's very helpful. So that's gonna be one of the resources you're gonna get access to. We're going to also create your project system and we're going to create a master resources and procedures system, your goals and promotions calendar, and your content board. So really focusing on those marketing type things that are going to lead to customers and sales. So, and then we'll have some marching orders at the end. So lots and lots to get through why we're doing this and what all we're gonna work through. So one thing is this is workshop style. So as you have questions, pop them into the chat and we'll work through them as we go. So if there are questions about what we're doing directly, I'll answer them then. If they're not, I might save them to the end, but we're gonna go section by section.

[00:07:26:20 - 00:07:45:14]

This is a lot to put into 60 to 90 minutes. So we're gonna do our best to get through as much as we can. I'm gonna give you some downtime to plug some things or to at least write down some ideas and things so that you can take this and get started. And run with it. There is going to be a replay. So you can rewatch this as you're setting up your systems,

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but it's really meant to be hands-on. These templates, I'm giving you some templates today. They're exclusive to my membership for the Action Driven Collective. And also my Simplified Business Strategy students. So this is kind of a portion,

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a quick overview of the Simplified Business Strategy course, but you being here live, you being here with me today, I'm giving you a lot of these resources because I just want you to be able to set yourself up for success and really do the thing that's on your heart and to do it well. And I think when we set ourselves up for success is when we can do things, we can do less and we can do better, right? That's kind of been my motto, do less, but better.

[00:08:33:00 - 00:09:41:16]

And like I said, I did this training inside the Action Driven Collective. When I was thinking about what to do for the topical training here today, I was gonna do a capacity and seasons training. So like, how can you fit your 90 day plan into the capacity and season that you have? We talked a little bit about that in the conference, if you were at the conference with me. So I was like, how do we get really tactical? That is one thing I love. I'm very action driven, very tactical. And so that's what I wanted to bring you today. So we're gonna work on organizing your goals and your projects so that you can have the time to actually work on them. So the first thing we're gonna go through is the Master Links spreadsheet. So this is, I'm gonna show you what it looks like. And Rich, if you wanna pop the copy link into the chat, if you have Google, then you'll be able to

just copy it. It'll make a template for you. If you do not, if it's not working for you, let me know. And we can also, I can also, I probably could just put the share link in here. If it doesn't work for you, try this link, but you do need to make a copy

[00:09:43:20 - 00:10:21:05]

because it won't let you type in it. It's just a viewable one, but you should be able to go to file. So if you go to file, make a copy, then it'll be yours and you can use this. So what's all inside here? The reason I have this and created this is because this way you don't need to have 500 tabs open. I wanna know, so I have a lot of tabs open right now. These are tabs we're working through today, but normally I do not have that many tabs open on my computer because it is so overwhelming to me. How many of you have more than five tabs open on your computer right now? Let me know in the chat, like put a thumbs up in the chat or yep, you guys do. Okay.

[00:10:22:13 - 00:10:43:09]

Coach Maggie said, I'm using my Master Links spreadsheet a lot, yes. So coach Maggie is in the RHA collective and she went through this training with me already. 20 to 30 tabs open, Dea go, oh my goodness, that's a lot. When I'm working with coaching clients, they share their screen. I'm like, how do you know what's up there? I don't know what's going on.

[00:10:44:13 - 00:11:32:16]

So one trick, I wanna tell you a trick. If you have Google, you can create these little dashboards here. I have a lot open right now just because of the conference and whatnot, but in order to create one, let's say you want to do, you want to put this resource, this Master Link spreadsheet on your dashboard, you can create a group. So you would just right click, add tab to the group, new group, and I could call it master. I'll just call it master for now. You can color code it and that goes in its own tab. So I can move these tabs around, I can close them. And what I like is then my dash looks really clean. So I have a working tab. So today we're in the working tab here. This one changes up based on what I'm working on. So anyway, just a little tip in case you have so many tabs open.

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(Laughs) Okay, I hope you all have gotten this spreadsheet open. Let me see. Rich, did you have a question?

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Just real quick, the great thing about the groups and the group tabs is if you typically work every day with, let's say you have five tabs that are your go-to for your tasks for the day, when you open your browser, you can just open that one group and it opens all the tabs for you. So you don't have to go in and open each page individually. And for those of us that have a workspace that we use over and over and over, it makes it really streamlined.

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Yeah, good point. Thank you, yes. It definitely streamlines the process. And what I like to like,

yeah, if I close my Chrome out completely, when I open it up, it saved it all. So I don't have to worry about that.

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All right, so here's what's on the spreadsheet. The first section is your business hub. So I like to call this important links. So things that you just want to access, have access at your fingertips. You want one place to store certain things. You're not thinking about where do I find this and whatnot.

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So I have the business dashboard. So that I think about like for me, keeper is what I use for a password hub. Some of you might have LastPass, some of you might have a spreadsheet, whatever it is, where you keep your passwords. I just have a login, like I just have my dashboard link here so I can easily get to that. And then I can log in. Same with Asana. Asana is my project management system. You may have ClickUp or Trello or Notion or MindMaster or MeisterMaster, MeisterTask, MeisterTask is what it's called. You might have a different one, but I like to link it there just for easy access. My business, Google Drive, I actually have a Google Cloud API link here.

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This says Google Vids because I use a Google Suite. You might not, I actually now use ScreenPal instead of Loom, but you can put any of those kind of like hub things, things that you go to quite often. You could put them here instead of having 500 tabs open. And then also I have a marketing section. So this is where you'll add the links. Your media kit, if you have a media kit, you can pop that there.

[00:13:50:15 - 00:15:22:02]

A collaboration spreadsheet. If you don't have a collaboration spreadsheet, you're gonna get one now. I'll, we'll get to that in a minute. But for those you are connecting with here, for anyone that you research, that you find that's complimentary to you, that you'd love to collaborate with in some way, easy to have that collaboration folder. We're gonna look at this folder here in a second. I'm not gonna dive deep into it. Actually, if you have the all access pass from the conference, you get a deep dive workshop with me on the back end that sets up your collaboration assets. So your collaboration folder and all the things you need to collaborate well. And then a social proof folder. So as you're gathering testimonials, social proof, case studies, you can have that linked right here for easy access in case you're using it in a webinar you're doing, an email you're writing, like promoting to the next person, things like that. So any kind of marketing things. And then also other assets. So here's where I put my brand. So I have a document that has my brand assets, my colors, my fonts, things like that. So it's easy access for me in case I need them, your SOPs. So SOPs, if you don't know what SOPs means, it's standard operating procedures. So you'll see that that is a huge thing in big companies. It's also huge in our companies. Even if you are a solopreneur, having SOPs like your workflows, how you do things is huge. So I create, I have a table of contents. I'll show you it. We're not going

through SOPs and FAQs today.

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But it's very helpful. So anytime you're doing something for the first time, do it and then create a workflow for the next time. Because you, for me, for example, I update my KDP links in my KDP books once a year. And then you have to re-upload and whatever. It's kind of a mess. It's a lot to figure out. And I never remember how to do it. So having that SOP is really handy. So I don't have to reinvent the wheel or try and figure it out again.

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And then this is anything that you're working through, like your current education that you're working through. So courses or memberships that you're in

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that you just want easy access to. So you can just link their dashboards right here so that you can get to them at any time.

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And then I have a customer support column. So this is my master FAQs. So for students and leads, frequently asked questions. When I get so many different, or the same question, I will create a response that I can easily copy and paste. And then I can cater it to that person and personalize it a little bit. So the master FAQs is awesome. So if you have one of those, you can link that here. If you don't have one, create one, it's amazing.

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And then feedback forms. If you have any different feedback forms, tests, program testimonials, intake forms, feedback, it's just easy to grab those links and then you can share them with people. Or you can look at the feedback that you've gotten. You can add whatever you want here, but those are some of the different things that I've found really helpful.

[00:16:50:12 - 00:17:01:15]

The second tab on here, and as I'm going through this, feel free to start. If you have this copied already, start writing your different things down. Write them down and you can add links later. What are you gonna wanna put in these columns?

[00:17:02:19 - 00:17:18:14]

And then we have the analytics section. I'm not a huge analytics person, but I know it's good for me to keep tabs or a pulse on my business. So there are certain things that I like to keep track of. I just put some simple things in here and you can change this up however you would like.

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But essentially, for website, how many visitors, what kind of organic searches, conversions from your website, email, number of total subscribers, new leads, average email open rate, whatever

you want. You could do click rate.

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You could do total revenue. You could break this down to your different programs, like what's coming from one-on-one coaching, what's coming from courses, what's coming from membership, what's coming from digital products, physical products. I have a podcast, so I like to see how many downloads I got each month. You might have YouTube analytics, blog analytics.

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If you use, like for me, I kinda use Pinterest, so I look at Pinterest for analytics.

[00:17:59:19 - 00:18:12:10]

Down here, I have information for what is Google Analytics and Pinterest Analytics, just some information there for you to be helpful. But it's nice to be able to see the longevity of it. I just kinda keep adding to it.

[00:18:13:19 - 00:18:55:02]

Mine is actually, now I've changed it, so this is the month we're on, and then I just do a new tab on the left. So it's always this. This column here is always the most current column, and then these are the past ones, but you can do it however you want. So that's kind of the analytics side. I'm not gonna dive too deep into that. And then content. We create a lot of content, and then we kind of forget about it sometimes, or like, oh, I had that one episode. That would have been really good to tell people about when it comes to marketing without social media, but I can't remember which one it is. So I come in here, and I write all my, this is my podcast. I have a blog one as well. You could put everything in here. And so you put the title of your long-form content. So for example, if it's a podcast,

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and then your publish date, the category. So you can change these categories by going to the Edit button. You can change these to whatever your categories are.

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If you do YouTube, you could add the YouTube link, the blog link, the URL, the podcast URL. I link my Asana in here, my Asana task for that content. We'll go over the content Asana board later.

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If there's any links or if my CTA is in here. And because I use Pinterest, I put like my pin, title, keywords, things like that in here, and different pins that I've made. I haven't done that in a while. But anyway, the thing I like about having this all here is that then you can do the finder and let's say I want to say, social media. I'm looking for something about social media. It'll highlight them and I can easily find which episode it is and grab the link that I need. So I just find

it really, really helpful,

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especially when you're repurposing content and different things like that. Emily, so the content tab is for things that have already been published. Yes, it's for things that have already been published or that are going to be published. And I usually just, I have my past, like the most recent content I leave at the top. So I'll usually do a row above, you know, as I'm publishing it, sometimes I'll add it in here, even if it's not published yet, and then I'll add the published links later. So once a month, I'll come in here and I update this.

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Yes, numbering them, I number my podcast episodes. It's really, really helpful because then you're like, it's just easy to find things.

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Hey Gabe, Emily asked if there's a way to automate the population of those cells, of those numbers. Have you found a way to integrate anything with this? I know it can be done with some things, but I personally haven't done it.

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Like for example, filling up part of the analytics, I think like if you want that just to go directly from your podcast and have it automate over here, I'm sure you can with like a third party zap, things like that. Also air table, air table, if you don't, if you use air table instead of Google spreadsheets, you can do very similar things here. I know that you can automate in those ways. I just haven't, because it's easy enough for me to just look really quick and write it down. I take about 15 to 30 minutes once a month to do this. But yeah, air table, I know is really great at that.

[00:21:34:05 - 00:22:22:13]

Okay, second tab, next tab is your products and services. So I love this because it keeps you organized as well. So putting down all of your offerings. So I have an example here, this is a course, so you can put what kind it is. And again, you can edit these fields to match what you do and then a description of it. And the reason I like this is because then I can come, if somebody's asking about it, I can come grab the description. It has like the pricing, your URLs, so your sales page, your cart page, any tags that they get, do they end up in an automation of some sort? Do you have any coupons codes, coupon codes for it right now, things like that. So I like to have them all in one place. It's easy for me to come see what I have, see if anything needs to be updated and just have the links right at my fingertips.

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And then the freebie, I do the same thing with a free resources. So any free resources you have, you can pop them in here with all the different links.

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Tatiana, you said it's all about my head, no problem. Only use what you need, right? You might not need all of these things. So whatever it is that you need, whatever's helpful, then you can either hide, you can hide things, hide sheet. I'm not gonna hide it because I don't know how to get back, but you can hide it or you can delete it or you can move the things that you want. Like you can just move these things around to whatever ones you want. And then, so affiliates, if you have any affiliate partnerships, Steve, yes. Okay, Rich, can you pop the template back into the chat? Thank you so much.

[00:23:09:11 - 00:23:38:14]

Affiliate partnerships, let's say you have affiliates with different softwares or you affiliate with another person who has a really great program or course or product or something that you love to promote. You can pop that stuff in here so you have it easily accessible for sending it to others or for promoting your affiliate link. Your affiliate dashboard, so it's easy for you to see kind of the progress that you're making with it. The support email, so their support. So for example, Zendler is my course platform that I use.

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So here's my affiliate link, here's my dashboard, and then support, this is their support email in case I need to ask them anything. What kind of commission that you get, any notes, maybe a note of payout, it happens every 30 days in PayPal, things like that.

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So that's kind of what this one is. And then this one is the one I wanna take a minute on. If you have the all access pass, you already got a collaboration spreadsheet from me, it was one of the bonuses, but I have this actually on my master link spreadsheet. So this is for anyone that I am currently either collaborating with or want to collaborate with. And then also like if I'm doing research for people that I wanna reach out to. So you can put their name, what's your current relationship with them? Do you have zero relationship? So it would be a cold pitch, or are you already really familiar with them? You're already friends with them. You have like some type of connection, you can put kind of where that is. If you have their contact info, their website or social media links, what is their business description? What are the main topics that they talk about? Who's their target audience?

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And then also what kind of collaborations you wanna do. So you can add different columns, like you could just insert a column, right? And this will still populate for you.

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So my favorites are lead magnet swaps,

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podcast swaps or podcast, guessing, JV workshops, partnerships, online events. And you can say this would be a potential, I'd wanna pitch them for that. Different notes, like notes may be on

what happened with the last followup. And you can have data of your most recent collab, or data of your most recent outreach. So then you can kind of easily go in here, and you could even filter like based on when was the last time you reached out to them to see who you need to reach out to next and things like that.

[00:25:37:19 - 00:25:59:17]

Okay, so that's that. And this is, I would like you guys to keep this handy for the week. Because any connections that you're making, you wanna keep in contact with them, or you think they'd make good collaborators in any way, affiliate collaborators, partnerships, you can pop their information right in here so that you can keep it for later. So this, I highly recommend utilizing this this week. Okay, the education tab.

[00:26:00:19 - 00:26:02:18]

This is, why thank you, Michelle.

[00:26:03:21 - 00:26:10:06]

I love doing these things. Planning and organizing is my specialty. So the continued education directory.

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I love this because again, like if you have the all access pass, for example, and you have all the speaker, like the paid speaker resources that you're getting free, some of them are courses, some of them are things that you wanna keep handy that you could use at some point, but you don't need right now, pop them into your continued education directory. When you get a free resource from someone, or you buy a course, or whatever it is, you can come in here, I have different categories, you can change these. So if it's for organization, if it's for coaching, if it's for content creation, collaborating, email marketing, SEO and website, whatever it is that you're going to learn, you can put it in here. So I have an example, the action driven collective. And then you can pick what kind of education directory is it. This one's a membership. Here's my dashboard link. So I can go right to the dashboard,

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access my portal, access my live events, all the news, everything that I need. So then I don't have to try and remember. I don't know about you guys, but I was like, okay, I have this one course. I can't remember how to log in. Now I gotta go to my email, the search for the access information, all of that.

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And so instead you just have it right here at your fingertips, the support email. If I need help, who do I go to? Who owns this resource? And then any notes or your main results or different things for this. So that way, remember yesterday we were talking about what questions you have about the goal that you are working on right now, the project you're working on right now. When it comes to learning, you wanna learn about that. Any questions that you have? Okay,

great, I'm gonna go find that. Well, now you can come in here and go, okay, I needed to learn about how to set up a YouTube channel. Okay, I have a course for that, perfect. I don't need to go buy anything. I don't need to do anything. I'm gonna go right into this course because I have it.

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Diego said, I wish I had met you early and in my business Gabe, this is so valuable. Awesome, I'm so glad.

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Perfect, so that's kind of what I do here with this continued education directory.

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Again, you can change this up. When you make a copy, you can change up anything. Also, I had mentioned, okay, keywords. So something that's really big and something that I really hate and I've never been good at is keywords. Okay, any of you feel me where it's like, I know I need the right keyword for my blog post. I need the right keyword for my podcast or my video for SEO purposes, right? What is my business all about? What are people searching? So I actually have a spreadsheet right here that I like to, yes, Jaclyn, exactly. So you're not buying more courses. Go to your course directory first to see what you have access to already before you go buy something. That would help you make a decision of yes or no, right?

[00:28:52:06 - 00:29:43:06]

But yeah, keywords is very hard. And so I have this step here where it's like, okay, each category that you have, you can type the category right here. So like, for example, goal planning. So these are the things that people might search. So I just keep a tab on this and then you can change it up if you need to, but the ones that you're finding that are working, pop them in here, ones that you're trying, pop them in here. And it's kind of like, okay, now it's go to, okay, I can create content for this keyword. Awesome, I'm gonna go do that, right? Keywords are your friends. Yes, they are, except I'm really bad. So my husband always made fun of me too, but how I search on Google is not how most people search on Google. Like I search a long answer. How do I make sourdough bread without spilling or without making a mess in my kitchen? The way I search is so dumb.

[00:29:44:15 - 00:29:55:19]

And so, good, I'm not alone. Awesome, thank you, Steph, for validating that. So my head goes, okay, search how you search for something. I'm like, but that's not a keyword. I don't search by stunt keywords.

[00:29:56:20 - 00:30:03:01]

But then I had to think about, okay, what is the keyword in there, right? How to make sourdough bread. That would be the keyword in there.

[00:30:04:09 - 00:30:26:20]

And then the last thing is the password. So I highly recommend having a secure password organizer, for example, I use Keeper, some people use LastPass, but when I was first getting started out, I just used a spreadsheet and it worked for me. So just having something to keep your passwords and everything handy is really, really important.

[00:30:28:04 - 00:30:40:00]

I like also, like in my password Keeper, I keep everything. So I have categories, I have the categories for the courses so that I can easily go in there and find the course and go to it too.

[00:30:42:03 - 00:30:57:13]

So, I'm just reading the chat to see, oh, search with GPT instead of Google. Yeah, exactly, a lot of people do that now. So now it's like, how do I get found in GPT, right? How do I get found in AI versus how do I get found in Google?

[00:31:00:02 - 00:31:43:07]

I love it. So this is the master link spreadsheet. I find it super valuable. I hope you will find it valuable. I want you to really focus on, especially if you have the all access pass, the continue education directory, fill this out. It's a really, really great and useful tool. And you can just add rows, insert a row here, so for however many that you need, and then the collaborative interest. Start filling that out for those, if you're in a marketing, if you're marketing your business, if you're working on collaborating, networking, referrals, all the things, you can start filling this out. You could have separate ones. Like you could have collab interests. It could be like, you could have a column or a spreadsheet for each different kind. So like if you're just doing referrals,

[00:31:44:23 - 00:31:49:04]

if you're doing collaborations, like workshops, whatever you wanna do, I like to keep it all in one place.

[00:31:50:08 - 00:32:20:16]

So that is that. If you have any questions about the spreadsheet, let me know, but we're gonna move into the Google Drive for organization. Now you might have something else. I've heard Proton is really good for those of us who hate Google. I use Google, it's like unnecessary evil. I could change it, but all my stuff's already in here. So it's hard to change it now, but you might have Microsoft Office, whatever it is, you might have Dropbox, but how you organize your things.

[00:32:22:08 - 00:33:02:19]

Victoria says you use Proton, awesome. So I have one hub. In my Google Drive, I have a folder that says my business name. And the reason I do that is because when you pop in here, it doesn't look overwhelming, does it? It looks really simple and I love simple. So inside of there, there's a few different things. Now you can take some screenshots or you can just watch the replay again, and you'll have access to this, but I have different folders, base folders for

everything in my business. Your folders might look different depending on what kind of a business that you have. I have an admin and customer support folder, a brand asset. So brand assets is gonna be like your media kit, your colors, your fonts, your logos, things like that, that you wanna keep handy.

[00:33:03:22 - 00:33:23:00]

Content creation, continued education resources. So I have like PDFs that I've downloaded, things like that. I pop them into there, and then I can link them on that directory that I was showing you. Financial and legal, marketing, and then programs and products. And you see that I have the master link spreadsheet right here, so it's easy access.

[00:33:24:00 - 00:33:40:00]

I don't, in the admin and customer support, I put customer support resources and SOPs. So we're not gonna dive too deep into the SOPs today, but what I have usually, and I'll show you this, this is inside of the Red Hot or inside of the Action Driven Collective,

[00:33:41:11 - 00:34:02:16]

I have a SOP document like this, and then I link all of my SOPs here. So like a daily workflow, guidelines, like how I name things, my template for my SOPs, how to add bookmarks to Google documents, because that's what I do here. And then I have a folder inside of here, SOP is the folder.

[00:34:04:02 - 00:34:23:17]

And all the SOPs, like if I have a video, I upload it here. If I have a document, I upload it here. And then they get on this SOP table of content. So it's really easy to find, because then I can go, okay, I'm trying to cancel a subscription, right? So now I can find, oh, there's how to do it. I can click on it, it'll go right to that SOP.

[00:34:25:10 - 00:34:36:15]

So that's what's inside there. And then some resources inside of customer support might be feedback forms, it might be your FAQs. FAQs, I have this inside of the,

[00:34:37:18 - 00:34:41:03]

so customer support, FAQs, general inquiries,

[00:34:43:17 - 00:35:15:00]

lead support, like a lead wants to be removed from specific communication, or do I offer one-on-one coaching? Where can I find more information on that? I forgot my password. So things that come up frequently for you, you can create a FAQ for it. I know a lot of people like to use AI for their FAQ. I do have an assistant AI who helps me create FAQs and different things like that, but I still like having my document because I still like things in my voice. So if I've written that answer many times, I'm gonna pop it in here, so it's easy for me to find.

[00:35:16:05 - 00:35:47:14]

So that is kind of what's inside the customer support. Your brand assets, again, like MediaKit, things like that, content creation. I would have a folder for podcast, for example, or YouTube or for blog, or for just workshops, things like that. So whatever content you're creating, continued education resources, again, I just pop like PDFs, things like that in there that I wanna keep handy. Financial and legal, your taxes, your finances, all that kind of thing. Marketing, so I'm gonna go in here for a second because we're talking about marketing.

[00:35:48:20 - 00:36:38:00]

A lot of you have a plan, or that's what your plan is for this week, is to work on a marketing strategy. So we have a collaboration assets folder. I love this folder. I keep it handy for anytime I collaborate because now if I find someone like, "Hey, Rich, let's collaborate. "Let's do a lead magnet swap together. "So here's my resource that I would love for your audience "to have grab semi-year resource." Well, now I only have to give them a folder and it has everything in it. So for example, I have my marketing without social lead magnet in here. What I would have inside of here, I'd have a Google doc that has like my bio, it has the link to the resource, it has the description, it has a swipe copy email for them to make it easy for them to promote. It'll have like a picture in here of the resource, things like that. Then I can just send them this drive right here.

[00:36:39:00 - 00:37:07:14]

My media kit in case I wanna share it. So I would put, maybe it's a Google doc, maybe it's a Canva PDF that you created that's really pretty. Maybe it's some head shots inside there, but you can just share that folder with people. So let's say you're doing a podcast swap or you're a guest on a podcast. Now when they're like, "Oh, I need all this information from you." You can just give them your media kit and it has all the information for you. And then social proof. So all of your testimonials, case studies, things like that inside that folder.

[00:37:08:16 - 00:37:30:08]

And then your programs and products. So every program or product that you have, have a folder for that, and then you can keep any assets inside of there. Emily said, "My two Google drives "are already at max capacity. "I need to delete old stuff." Yes. Okay, so here's a tip. If you need to delete old stuff, here's what I would do. I would go to your, well, here, the sample Google drive folder.

[00:37:31:08 - 00:37:38:05]

What I would do, this is, be sure this is your Google drive and it's super messy. I would create a folder that says, go through.

[00:37:39:11 - 00:37:40:19]

I'd pop everything into there.

[00:37:42:08 - 00:37:53:20]

All of your things, everything. And then I would create this folder with your organization that you

want. And then what you can do is over time, you can start going through these and move these, anything in here, to either trash

[00:37:54:20 - 00:38:04:04]

or you can move them to the appropriate folder. That way you can just start with kind of a clean slate, but you still have everything in case you need it. So that would be my recommendation.

[00:38:05:19 - 00:38:24:11]

So that is kind of the Google drive folder. You can do this with any different type of system, but it's really, really important to set yourself up for success. So you know where to find things. You have that simple folder you're opening up to, assets in one place. And I already just told you to clean it out that way. So perfect.

[00:38:25:17 - 00:38:40:16]

(Laughs) All right, so if you have any questions about that, let me know. The other things, like I said, I'm not gonna go through too in depth is having those FAQs, like creating an FAQ, either an FAQ agent in AI to help you out where you can pop someone's question and it already has your FAQs populating.

[00:38:41:16 - 00:38:55:01]

I've found, I still really like to write my own. I just know it's my voice. So I like having my document and the FAQ document. I can go into search for what I want, copy and paste, and then personalize it based on the person.

[00:38:56:08 - 00:39:07:10]

I love having that human aspect in there. I don't think that's replaceable. And then those SOPs in the shared folder. So this is the folder inside of the action driven collective.

[00:39:08:15 - 00:39:12:08]

They get the sample Google drive organization folder that I just showed you.

[00:39:13:11 - 00:40:01:02]

They also get the master FAQ template to make their own and the master SOP table of contents to make their own. So that is something that I keep in there. And then I have a template standard operating procedures. So essentially it's just like the name of the procedure, the purpose, do you need anything to go with it? Who's going to do it? And then here's the process. Now, one thing I have found is that I like to keep things simple. So if I'm just gonna do a walkthrough screen share video, I'm gonna link that to this template here. I'm not gonna make it complicated. I'm not gonna create a official SOP for everything. If it has a video SOP, I'm gonna do that. If it's just a quick walkthrough, like these are the steps, I'm gonna create that in Google and I'm gonna link it to my master folder. So hopefully that makes sense.

[00:40:02:07 - 00:40:05:03]

All right, so we went through the sample. Now what I want to do with you

[00:40:06:22 - 00:40:22:02]

is I wanna create your project system. So Emily said that might be the most actionable tip I can see myself definitely making for how to start organizing the mess. I also just made my own FAQ page a week ago, but it isn't really built out yet. Awesome, yes.

[00:40:23:04 - 00:40:25:01]

So good, I'm glad that tip was helpful.

[00:40:27:01 - 00:40:30:16]

I'm just looking to see if there's anything else in the chat that I need to do.

[00:40:38:09 - 00:41:16:09]

Okay, perfect. So get your project management system out and get your 90 day plan because now that's what we're gonna be working on right now. I use Asana, I love Asana. One of the reasons I love it is because it's free. Who doesn't like free stuff, right? And it's free and it has everything I need. I've never had to upgrade to the paid version. So, but there are so many different ones out there. This works for my brain because I do like I'm kind of task oriented. So I like the to-do list. I like kind of how it looks. But for you, if you're very visual, you might like Trello. If you're very, I know Notion can link with other things and like the writing and all those aspects.

[00:41:17:09 - 00:41:25:15]

So Emily said, oh, any recommendation on project management system that hasn't had an excessive learning curve.

[00:41:27:19 - 00:41:50:14]

And Ashlyn said, I use Notion for everything. Yeah, some people, I mean, depending on what you want. I always say, just go with one and there are learning curves to each, but once you have it and you have it working, it'll work for you. I always say also pick the one that's gonna work for your brain because that's the one that's gonna be less of a learning curve. I like Asana, it works for my brain.

[00:41:53:03 - 00:41:57:09]

Some people like, and it kind of depends on how you use it, right?

[00:41:59:14 - 00:42:05:08]

I'm seeing in the chat, Notion might have the biggest learning curve, but it is very customizable. There's so many things that you can do with it.

[00:42:06:17 - 00:42:43:14]

And then you could have just a spreadsheet. You could have just a calendar, whatever it is. The

reason I like having a project management system is because of the repeatable tasks that we do. You can set it to repeat. So I'm gonna show you a couple of, and you are gonna get a couple of these templates today. So if you use Asana, you're welcome. If you wanna use Asana, you're welcome. If you don't use it, you can look at what I'm doing and set it up in your project management system the way that it would be set up. So yes, it is free. And is Ash, Ash-eline, Ash, Ash-eline, am I saying it right? Ash-eline, I know it hasn't.

[00:42:45:15 - 00:44:00:20]

Ash-eline, okay, awesome. I'm so glad. Yep, Asana's free. You can get a paid version if you add tons of people to your team or you want some certain things, you can use it. I have people in here on my team and I don't have to pay for it. So, okay. So what I'm gonna show you here is the first one and this, Rich, you can put this template into the chat. It's our, I call it the Red Hot Operations Hub. Now I call it that because my business is Red Hot Mindset. So it's your operations hub, whatever you wanna call it. But I just like my fun names, okay? So bear with me there. And when I'm looking at my hub, I actually prefer to look at it in list form, but there are different forms. So this is, you can look at it in a board view. You can look at the calendar. If you use the calendar options, there's certain ones I think workflow I can't see. See, there's certain things you can't see if you're not on the page, but I don't care. I only really look at list, board and calendar. But I like the list for the Red Hot Operations Hub. This hub is every single thing that you do in your business at any given time. So it is your one-off tasks. It's your recurring tasks. It's things that you do daily, weekly, monthly, annually.

[00:44:02:15 - 00:44:07:14]

Okay, but it is your hub for everything so that you can see it at a glance.

[00:44:08:19 - 00:44:19:11]

So what is inside this template is I always have a resources section in pretty much any project board I have, because then it's easy for me to go to that important resources and find what I need.

[00:44:21:19 - 00:44:23:21]

And so, let's see.

[00:44:26:05 - 00:44:31:22]

Now what you're gonna get is a download of a CSV file. I should have told you that. So when it comes to Asana,

[00:44:33:09 - 00:44:38:01]

what you'll do is you'll go to Create and then you'll create Project.

[00:44:39:02 - 00:44:55:16]

And then you can say Import at the top right here. You can name it and then you're gonna select the file and it's gonna be a CSV file. I don't have one accessible right here. And then it'll

upload and then it'll show you it kind of in this form. So that's what you'll do in order to get it in there.

[00:44:57:00 - 00:45:26:21]

Okay, so important resources. I always link my master link spreadsheet, my master FAQ, my SOPs, my course logins, things like that. Whatever you want to keep handy in this board, that's what I do. The other thing that I have here for you, this is also life-changing, okay? Your ongoing business subscriptions. So, do you pay for anything in your business right now? Your email marketing software, any ongoing subscriptions for courses, memberships, hosting, website hosting,

[00:45:28:00 - 00:45:45:00]

Google workspace, all the things. And then you're like, okay, when does that come out again? And how much am I actually spending? And oh, by the way, am I actually using that? So you get charged and they're like, I haven't been using that, shoot, I should have changed it. I guess I'll cancel it next time. And then you forget. Ongoing business subscriptions.

[00:45:47:05 - 00:46:52:07]

I put like a thing here where annual expenses, what are your annual expenses with your subscriptions? What are your monthly expenses? So you can budget it out and you know how much your business is spending, right? Your expenses. And then down here, in the subtasks, you can, and I do, I auto-renew pretty much everything. I don't like to have to think about it, but I do have these tasks here. So for example, this is not called that anymore, the action-driven collective. I'm a part of that membership and maybe I'm on the monthly, so it comes out monthly on the 10th, or maybe I'm on the six month or the annual subscription. I usually write kind of when it comes out, so I can see easily. Then let's say it's monthly on the 10th. I might not actually assign myself this, but let's say yearly. So the website yearly on January, I'm gonna assign myself a task in like two weeks before. So let's say December 21st. So it's automatically gonna go to my task list, which is right here on the left side, anything that you signed to yourself.

[00:46:53:08 - 00:47:03:20]

And I'll see it ahead of when the subscription is due. And then I can decide, do I still need that? Is that still working for me or whatnot? So then you can cancel it if you need.

[00:47:04:24 - 00:47:32:19]

So this is really, really helpful, I promise you. Your email marketing software, your learning platform, your accountant, if you use an accountant, whatever it is that you have expenses for in your business. The other thing that you can do is just periodically, so what I actually have set up now is I will just every six months or so look at all my subscriptions and make sure I'm good with them or if I need to make any changes. So you can also set up the task like that, the main task or the subtasks.

[00:47:34:07 - 00:47:42:21]

And then also, I have an ongoing living expenses one in here as well. So what are the annual expenses of all of the streaming,

[00:47:44:03 - 00:48:06:17]

streaming things that you're doing, memberships, clubs, gyms, all the things, what are your monthly expenses and then you can do the same thing here, like car insurance, medical insurance, gas, all your bills, anything that you wanna put in here because it's easy. And then you could say, oh, you know what? I've been meaning to look for new car insurance to see if I can get it cheaper. Maybe I should do that this year when it's about ready to be renewed.

[00:48:10:19 - 00:48:45:13]

Having a VA is fun. Okay, so I have that in here. And then I have a brain dump. We're all visionaries. If you're an entrepreneur, you're a visionary in some way. I know you have a lot of ideas in your head. And the problem is, or the problem with going after our goals, like the main goal that's in front of us, the plan that we just did yesterday is that more ideas will come. So I like to have a brain dump section. So this is just a task that you can just pop your ideas here so that you know that they're there and they're ready for you when you need them. You can get it out of your head, pop them there.

[00:48:46:20 - 00:49:07:12]

And then I also have emergency and service contacts. This is for someone who wants to, kind of their life stuff in here, like the school number of your kid, your electrician, different things that you wanna keep handy. So that's just some resources. The brain dump is super helpful. The daily things. So daily things would be checking your inbox daily. If you wanna do that,

[00:49:08:20 - 00:49:12:12]

checking for me, checking Slack daily, right? So some of these things.

[00:49:14:09 - 00:49:36:21]

I have one task that's like everyday to-do list that's non-work related. And then I have random business to-do list. So these are things that are not as important. I'm not going to put them in a recurring task, but they're kind of admin type things that I need to do at some point. And what I actually do in my admin hour, so I will schedule these for Thursdays because Thursday is my admin day.

[00:49:38:14 - 00:49:49:02]

In my admin time, I'll come in here, I do a power hour and I get done whatever I can from the list instead of having it assigned out as a specific task. So lots of different ways you can do it.

[00:49:50:08 - 00:50:18:15]

Okay, so weekly. We talked about having a business with yourself, a business meeting with yourself yesterday, right? For your full planning and for your business. So you can set this up and you can, what I love about it is you can sign due dates to this. So I could say every, I like to

do them on Fridays right before I get done with work and for the weekend and I can set it to repeat. This is why I like Asana too. I can have it repeat weekly, monthly, yearly, whenever I want. So I'm going to say, I'm going to set it to repeat weekly.

[00:50:19:16 - 00:50:24:19]

So now this is going to go in my tasks on Fridays. And I remember, oh yeah, I have to have that weekly meeting with myself.

[00:50:25:22 - 00:50:32:09]

Some things to do in this meeting. You can just have your workflow right here. You don't need a formal SOP, just what are you going to do in your meetings time?

[00:50:33:18 - 00:50:51:19]

I have a weekly family meeting because it's important for us to know who's going where and what are we all doing? The power hours, like I had mentioned, I do those for any random everyday tasks. Inbox zero, do you want to get your inbox down to zero every week, once a day, once a week, whatever it is.

[00:50:55:14 - 00:51:06:17]

So, and then monthly, I mean, so here's some monthly things. I back up the Asana workflows. So for example, this one, I'll just click up here. I go to export and export this as a CSV file.

[00:51:07:21 - 00:51:23:23]

And the reason I do that is because then I put that in my Google folder, in my admin. And in case Asana blows up or something happens, I can now keep my CSV file. And I know I have all my tasks and stuff. So I can pop them in somewhere else or I don't lose it.

[00:51:25:01 - 00:51:48:04]

Check analytics monthly, check feedback forms monthly, whatever it is that you need to do. So what I would recommend with this is taking time to write out a list of everything that you do in your business. What is it that you do from start to finish? And then next to it, say, okay, this is something I do daily. This is something I do weekly. This is something I do monthly. This is just a one-off task that I need to get done.

[00:51:49:11 - 00:52:09:19]

Because then you can pop those in here where they need to be and you can set them to recur however you would like. I consider daily anything that happens more than once a week. So because I can go in here and set this to my due date could be recurring on three days a week. So you can click that, but I like to think about it as daily.

[00:52:12:13 - 00:52:48:03]

All right, annual. And then I have the projects and one-off tasks here. You could separate those projects. So the things that we were working through yesterday, your goals could go here. I'm

gonna give you a different place to put them, but you could put them here or just one-off tasks that need to get done so that you just throw them in there and then you could go to them on your admin day or you can assign them to yourself. So that's what the Red Hat operations system looks like. You can look at it in board view if you like. You can add emojis, you can add pictures. So if you want it to look more like Trello, you can add a picture to something. Like essentially you just need to attach a file

[00:52:49:21 - 00:52:51:00]

and you can attach a picture.

[00:52:52:14 - 00:53:08:19]

I don't really have any pictures to show you, but that's a video, but you can attach it. And then it'll look like a picture. I'll show you that in a second. You can attach files here. You can do a lot of things. So like if there's something that I wanna keep with that, I'll attach the file there. So it's easy for me to see.

[00:53:11:00 - 00:53:22:04]

Okay, so that is the Red Hat operations hub. I want you to think about how can you organize yourself in there. I'm gonna show you one other thing that I found really helpful. I call it my helpful resources.

[00:53:23:09 - 00:53:44:16]

And this is kind of like a hub for lots of different links, lots of different things. I have my important resources, my master link spreadsheet, my SOPs and my FOQs are always right where I need them. And essentially it's just a link to them so that I can easily find them. I have my brand colors right here, easy to find, my brand folder, my media kit,

[00:53:47:16 - 00:54:15:18]

bookkeeping resources, things like that. And then I have some customer support resources. So these are all my programs. So anything that I need to grab really quickly will be inside of here, software resources. So any software you use, you could put this into your helpful resources hub, just put the name of the software. So for example, I use add calendar for you being able to put all of these events on your own calendar in your own time zone and all of the things without it having to be on Google.

[00:54:17:08 - 00:54:38:05]

So then I just put some SOPs in here. So like how to remove a canceled member from RHA. I have a little walkthrough that I did and then this is the steps. So I can easily come in here and find what I need about it or different articles, help articles that I've used that are helpful. So any of the softwares I use are inside of here. I have some chat GPTs, so resources inside of here,

[00:54:39:14 - 00:54:43:13]

current courses or trainings again, in case I wanna keep easy access to those.

[00:54:45:21 - 00:54:50:09]

So this is just a hub of resources and I really like it. You can come to it at any time

[00:54:51:12 - 00:55:07:13]

or you can have everything on your master link spreadsheet too. So the last thing I want to really work through with you, well, there's two things. Let me show you the content board because you're not gonna get the Asana, the CSV for this one but the content board,

[00:55:09:07 - 00:55:12:10]

oh, I had the helpful resources right there, already open and ready for you.

[00:55:13:13 - 00:55:26:00]

This is the content board. So if you are creating content, let's say you're creating a podcast, creating YouTube, creating blogs, I recommend having a project board in your product management system set up specifically for that content.

[00:55:29:06 - 00:55:59:05]

Kathy asks, Gabe, it seems like you have everything in Google Drive in Asana, why put them in both? Okay, so that's a really good question. For me, I like to have easy access. I work out of Asana, I don't work out of my Google Drive, so I want easy access to everything. So my helpful resources just has a easy link to things but sometimes some people are really good at just going into Google Drive and searching for what they need. So like media kit, right? And you can just come in and search. So I like it organized here but I like it all linked inside of my Asana.

[00:56:01:20 - 00:56:46:13]

Okay, so for the content board, I like to have a content board set up in a board view, more than a list view, but depending. This is where I use my calendar but I have templates and resources set up. And for example, let's say you're doing some podcast, you have your own podcast and you do interviews or you are a guest on someone's podcast. You can come in here and I created some templates. So again, I have resources right here, just easy links to find like podcast application for people, my media kit, places I've been featured. And then I have my solo podcast template and my podcast interview template. So let me show you what that looks like. Essentially, I come here and I will duplicate the task for interview.

[00:56:47:19 - 00:56:55:14]

So I would do the same with a blog workflow or a YouTube video workflow. I duplicate it, I would title it, whatever the title of the podcast or YouTube video is going to be.

[00:56:56:21 - 00:57:06:20]

And then I can assign it for, I usually assign it for when it is going to be published. And I'll show you the reason for that in a second here. Actually, I'll just pretend it's gonna be published tomorrow.

[00:57:08:20 - 00:57:11:05]

What's my call to action inside of this content?

[00:57:12:08 - 00:57:16:12]

Any links I need, this is not my podcast description. So it's easy for me to grab.

[00:57:17:19 - 00:57:40:20]

And then here's the workflow. So send booking details with the topic, schedule the interview, send the interview details, the Zoom link, whatever it is, plan and outline the interview, record, send a thank you, write the show notes all the way through, like when I used to use social media or Pinterest for it, then I'd have all these. And you can then assign these out based on when you want to do them.

[00:57:42:04 - 00:57:44:05]

So it's kind of a cool little feature.

[00:57:47:19 - 00:58:03:11]

And then when you look in calendar view, if you do assign it to when it's published, you can see. So I know I'm publishing this one on Wednesday, I need to get it done by Wednesday type of a thing. So anyway, that is the content board. I just wanted to kind of show you what it can look like. So this is my guest podcasting session,

[00:58:04:23 - 00:58:12:16]

potentials, potentials. I'm working on this outline, I'm ready to record, I'm ready to edit, it's uploaded and then it's published.

[00:58:27:21 - 00:59:20:06]

audience member speaking) Sorry, I'm reading the chat. Okay, so but where I wanna sit for the last part of this is the goals project board. I call it like the goals and promotion project board. So now you're looking at your 90 day plan. And now we're gonna kind of break that out into different projects here. So this is a CSV file I wanna give you. So Rich, if you wanna pop that into the chat here. And do you see how I have pictures there and it looks pretty, kind of looks more like Trello. That's what happens when you add a picture. So I just attached a file and the picture is right here, but then it looks really pretty right here. So the goal planning resource and resources. So like I said, I always have a resources section and then I just month, it's monthly. So I haven't changed these dates because this isn't my specific one. I can show you my specific ones. So you can see, but it goes all the way through the year.

[00:59:21:24 - 00:59:28:19]

And in here in the resources, what you'll get with the CSV file is this as well. You'll get a template for collaborations.

[00:59:29:19 - 01:00:13:14]

So these are kind of event collaborations, bundles, summits, workshops, things like that. And what you can do with this is here's the important date. So more important things about the event. So if there's like a speaker portal or a contributor portal or something like that, you can link that right here. So you can easily find the information about it. And then when is your promotional period? When is the event date? What are you contributing? Cause sometimes I forget what I contribute to things. So it's nice to have this handy to remember, oh yeah, I'm contributing that. So if I do another promotion like around that same time, I might contribute something different. If they have an affiliate link for you, what your to-dos are, and then you can do some subtasks if you want to,

[01:00:14:21 - 01:00:22:07]

which I do have some subtasks usually based on like, send the email or think about when you're gonna schedule these things.

[01:00:24:07 - 01:00:37:05]

But I also, let's see. So that's what this one is. And you can put the date of the event, the event name, the event host, and what you can do. So let's say I know I'm going to do this in January. So it's gonna be January.

[01:00:38:22 - 01:00:46:02]

And the event is called GBWS and it's Gabe.

[01:00:47:13 - 01:02:04:21]

So I'm just gonna do that really quickly. So it'll duplicate that template. So I'm not using that template and I can just move it where it belongs. So I now can see in January, I'm doing a big collaboration. I'm speaking at an event. The other thing I like to put in here as I'm planning my goals for the next 90 days or the next 30 days is I like to put vacation time. So what you'll see kind of down at the back, December holiday break. So let's say in, where are we? In June, you know that you're going to be taking a camping trip. What I would do is write camping trip and then just the dates. So June 10th through the 15th. Because you know you don't want to do any launches at that time. You don't want to do anything too active in your business. So it just helps you to see, okay, I don't have the capacity to do as much this month. So I need to kind of think about that. The other thing I like to put in here is, so we have collaborations. So any collaborations we're thinking about doing or we're doing, we're set for. And then the goals. So if you think about those three priorities that you picked yesterday, I would write them down. So maybe it is to set up my podcast. Maybe that's your project. So I would like to put that in here as a project.

[01:02:05:22 - 01:02:20:14]

And then also in here, I'm doing a speaking at an event. And the event is June 25th, just so I can see. So I have vacations here. I have collaborations here and I have my projects here.

[01:02:22:14 - 01:02:36:17]

And then you're seeing the capacity. Like how much capacity do I have? Can I add another thing? Can I do another project? Or do I need to say no to that thing? Or do I need to say, sure, I can do it in July because I have openings in July. Hopefully that makes sense.

[01:02:37:19 - 01:02:53:14]

And then what you can decide is maybe in here, you do your project itself, but you can also, what I love about this is I can set this up to go into Red Hat headquarters. So like my hub and I can put it under my projects. So current projects.

[01:02:55:01 - 01:03:17:12]

And then I can do any subtasks. I can put anything in the description, anything that's helpful for me that I need for this. I'm gonna write in this description. I'm gonna do any tasks. So like your, this is your main, like this is one of your projects or goals. Now you can say, okay, now I need to decide on a podcasting platform, hosting, right?

[01:03:18:16 - 01:03:27:08]

And then you can put out all your tasks here. And then you can decide, do I wanna have a specific day or time to, like maybe I wanna do this every Wednesday.

[01:03:28:14 - 01:04:01:04]

And then I'm just gonna go down here and go to the next thing. Or you can assign each of these, like, okay, I'm gonna decide, I'm gonna work on that. I'm gonna research that Thursday. I'm gonna make a decision and then move to the next thing. So you can kind of decide how you want to put this together. But that is kind of how I like to set up my, any projects, anything that I'm working on currently. But when you see the overview, so I'm gonna actually show you my boards. You can see the, you can see the, I'm gonna actually show you my boards. You can kind of see what it looks like when someone's got a lot of things going on.

[01:04:02:06 - 01:04:35:00]

So you can see in May, I have run implementation week and I have a task for implementation week itself or a project board for it. So I don't put a lot of things in here. And then create my antisocial advantage pod funnel. So I have another podcast I'm creating. And then here I have, and I do little emojis. So this is my emoji for events that I'm a part of. So I'm hosting my Grow Your Biz Without social. And I was also a part of another coaching event. So, and then you see like different lead magnet swaps. So that little icon means that it's a collaboration.

[01:04:37:20 - 01:05:16:11]

Outline my third book, working on, this is one of my projects I have and then create some templates and tutorials for the shop. So, and then over here you can see, oh, I'm gonna be gone over the 4th of July. So I'm gonna be gone for quite a while. So maybe do a little bit less, maybe not as many project work. Maybe my goals are gonna be a little bit less that month. I'm still gonna do some collaborations. So that's kind of what the board can look like. So what I want to

do in our last bit of time, let me see, make sure I got through all of these things that I want to, I know it's a lot. I'm firehosing you again. That's why we have the replay. But I want you to start setting some of these things up, however you would like.

[01:05:18:12 - 01:06:03:06]

If you have questions, I can screen share some different things. The other thing is when you're in Slack this week, if you're setting up some of these systems, some of these backend organizations, you can use the screen share feature. So if you're in here in the drop-in coaching, there is this video icon and you can turn your camera off if you want and you can screen share. And then you can show us the backend of your Asana or your Trello or your Notion. Now I won't know how to like set up those ones if you're not in Asana, but I can help kind of give you some troubleshooting, some ideas for how to set it up so that it's set up for how your brain works, right? Because we don't want to set it up and then not use it. We want to use it based on how your brain works. So in this last time, I want you to kind of take this time to fill out some of these spreadsheets,

[01:06:04:13 - 01:06:16:03]

fill out your helpful resources, fill out your hub. So here's what my hub looks like. I like to use icons, if you can tell. It makes it just fun and pretty for my brain.

[01:06:17:12 - 01:06:50:09]

So I have one off tasks. I actually changed mine to be themes. So I have like current projects in here. I have projects to consider because then that's my brain dump. And then I have my admin tasks. And then I have my podcast and then my marketing and my meetings, programs. So just so that I, that's how my brain works. I work in themes. So I think I had mentioned that yesterday. Mondays are my marketing days. Wednesdays are my podcast days. Thursdays are my admin days. So I kind of work in themes that way. So it's easy for me to come in here and see the theme of the day.

[01:06:52:08 - 01:07:31:24]

That's what mine looks like. Okay, I'm popping to the chat. I'm going to stop my share so I can see everybody again. So, whew, that's a lot of stuff. That was a lot of information, wasn't it? I'm going to on, I see some of you shaking your head. Like, yeah, that was a lot of information. Let me see, hang on one second. Unpin, remove my spotlight so I can see all of you. Okay, perfect. Now I'm gonna go to the chat and see what we need to cover. And Rich, if there's any specific questions that you can see, let me know. Was there anything that you didn't hear me talk about that normally I talk about or any other tips or things that might be helpful for them? If you know of anything, let me know, Rich.

[01:07:33:09 - 01:07:52:16]

Okay, yeah, I think you did a great job of covering everything. So one thing that is coming up a lot is some questions about Google Workspace. And I'm curious, Gabe, if you want to just share a little bit about why you choose to have the paid Google Workspace. I know for me, I wanted to

have an email domain

[01:07:53:19 - 01:08:22:12]

kind of affiliated with my website. And that was one of the easiest ways to get that because at the same time, I also needed more storage. And as you know, working with clients, sometimes file sharing is a lot easier to use a Workspace-like platform. And a lot of people already have it. So I was kind of, that was the best option for me. So how about you? What made you choose Workspace? Yeah, I mean, part of me, like one of the reasons I got off social media is I don't want to give Meta my money.

[01:08:24:09 - 01:08:24:10]

(Laughs)

[01:08:25:17 - 01:08:54:21]

It's a bigger evil, right? Like for me, personally. I kind of feel like that about Google. I feel like that about Amazon. Like there's some, all these big box companies that I don't want to give my money to, but part of it is the simplicity of it. It's like the easy access of it. This is what people are using. So it's easier for me to connect with people when I use it. So when I made the decision for Google Workspace, I do have a paid one for extra storage and for the business features is because I,

[01:08:55:24 - 01:09:07:16]

it was like the one, it was the thing to use, six years ago, and it was easy to set up. I could use my Google email, like I bought, that's my business email is through Google.

[01:09:09:02 - 01:09:31:18]

And other people, like people, you can see it, they share, it's easy to share resources with others and to make copies of resources and stuff. So the benefits outweighed the cons to me. So that's the main reason that I chose it. I have looked at, I know a couple of you have said they use Proton in here. I'm starting to kind of look at different options, but I kind of go, is it worth it for me to switch?

[01:09:32:21 - 01:10:22:22]

Because everything I have is right there. So that'd be a lot of work to switch. So it's a matter of keeping it simple and just using what I know. I know Google really well, that's the other reason because it worked well. I used to use Word and spreadsheets, now I have Mac. So I don't like the Mac ones on my computer. Google was the easiest transition to that. So does that make sense? It does, yeah. And a couple of other things that come to mind for me are using Sheets, I used to use Excel and I would have to pay for Microsoft Office every year to use Excel and Word. So you have Sheets, you have Docs and all those things, but I am a fan of Proton and I've recently been looking at Proton Drive and if I can figure out an easy way to transfer everything over and to still be able to utilize all the things I need to utilize, I will definitely consider that.

[01:10:24:00 - 01:10:57:04]

And then another question. Instead of the Excel and all that stuff, Rich, this is Christine, you can use LibreOffice and it's free. I do donate to them because I like what they're doing. It's open source, ODS, and they have everything. So LibreOffice is in, yeah, there's some other people who know about it. I especially use this because when I've used VAs who are foreign, they can download it for free and help me using the same platform and it has all the same features,

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spreadsheet, documents, publisher,

[01:11:02:08 - 01:11:05:16]

all the slide presentations, the whole nine yards.

[01:11:06:22 - 01:11:13:10]

Awesome, I'm gonna pop that up. I like learning different things, so that's good. Thank you.

[01:11:15:11 - 01:12:26:20]

Okay, was there another question that you had, Rich? Well, I did see Hostinger come up a couple of times and someone asked if anyone uses Hostinger and I don't have an affiliate link or anything. Gabe, you might, but Gabe and I both use Hostinger. I started with them a couple of years ago and I'm very happy with them. If you have need for a web host, I recommend them. Their support has been fantastic and they're a very affordable option compared to some of the other platforms out there. And if you're not needing to use a separate site builder, I think that the Hostinger site builder is very intuitive and easy to use as well. So that's my opinion. Hostinger would be a great option for someone, especially service-based businesses where you just want that landing page at first and you don't want anything too complicated. Cause yeah, I think they start, the hosting is super reasonable, like \$2 a month. It starts at with the specials, two or \$3 a month. I don't even know if I have an affiliate link, but I do use Hostinger. I love it. I switched about two years ago. I've been very pleased with Hostinger. You can buy your domain on there or you can just host on there or you can do both.

[01:12:27:23 - 01:12:46:18]

And I think I use, right now I have name.com for my domain itself, but I'm planning on probably moving it over once that expires or once I have to renew and just doing everything on Hostinger. They've been, the customer support's really good. It's very budget friendly. And then you can create websites right on there if you wanted to.

[01:12:48:02 - 01:13:36:07]

I did see a question from Velvet. I love this question. She asked, "What recommendations do you have for us who schedule tasks in a written planner yet want to capture business progress and repeatable project steps over time in the first year of business?" Okay, I did not start with a project management system. That's for sure. I started with pen and paper. I found that my to-do

list overwhelmed me because they weren't organized enough for me and I would cross off and then there'd be a lot of things crossed off and then there'd be some things that aren't and I keep adding to it. And if you're anything like me, I add things that I got done so I can cross them off if they weren't on the list because it helps me look more productive. But here's my recommendation. If you just are doing like pen and paper, yes, Coach Miggie, I know it's funny. If you're just doing pen and paper, totally fine. Here's what I used to do in the beginning.

[01:13:37:11 - 01:13:39:08]

I wrote out like, okay,

[01:13:41:03 - 01:13:42:11]

I guess I could show you this.

[01:13:44:03 - 01:14:21:14]

I do still use pen and paper just so you know, for different things. But this is like my time block sheet and you can't really see it, but it has different times that I'm working. The blue is like, well, the blue isn't blue. It's supposed to be different colors, but my ink was not working so I gotta redo this. It has my time blocks for different things. Lots of white space because that's what we need is some white space. But what I do, if you can tell, this is in like a laminated sheet. So what I used to do is I'd make recurring tasks. So like, for example, my admin tasks that I would do every day, I would make recurring and have like check boxes and stuff

[01:14:22:22 - 01:15:25:06]

for like a week. So I would do it as a week work and then put it in one of these laminated. They're just like the page protectors. And then I would use dry erase marker. So then I could mark it off, but then I wouldn't have to recreate it every time and write it out every time. And then I would erase it the next week and I'd do it over. So my weekly planning, I would use that sheet and I would look at, okay, what else do I have to add? Anything that I need to do, get that organized. And then that would be my like kind of checker, my task manager, if you will. So that I found really helpful. You can do that with a lot of different things. You could do that for a project. So you could write everything out in a list, especially projects a lot of times are one-off things. So thinking about your goals, your 988 goals, if you're starting a podcast, for example, if you're starting a collaboration system, that might be one we wanna redo or have something like this, but then you could write it all out and you could use that. I like to organize it in kind of strategic steps.

[01:15:26:11 - 01:15:40:09]

So I would probably brain dump it all. And then I'd put it like, okay, here's the first thing I wanna do. Here's the second thing I wanna do. Here's the ongoing things I need to do. Here's things that are just one-off. What's gonna be the easiest to do, that kind of a thing.

[01:15:44:10 - 01:16:00:11]

You use a dry erase board. Yep. Yeah, I like it because then I don't have to redo it. Like the

thing is I don't wanna have to redo it. I can redo the thing that goes in here. It's typed up, right? Like I can redo that, but then it's like, that's a lot easier than having to write it out every single week. Diego, I see your hand is up.

[01:16:02:03 - 01:16:04:13]

Yeah, I'm sharing the textbooks.

[01:16:05:23 - 01:16:11:08]

There is an option for building landing pages. That is free. It's card.co.

[01:16:12:10 - 01:16:43:02]

Card.co is not that hard. And you can build your landing page there. Landing page is perfect for solopreneurs because when you're just first starting journey, website with three or five tabs, you just need all the information that you want or the services that you are providing. And that is it. So you can guide you, use card to build your landing page. Oh, I love that. Yeah. What is the place? What is the thing? Is it lead pages you're talking about? You can do a free one on there.

[01:16:44:13 - 01:16:57:12]

Or what was this, the software you said? Oh, card. Okay, it's in the link. Oh, card. Okay, it's in the chat. So Diego said, card.co. So C-A-R-D-D.co. So another great option. I love that.

[01:16:59:10 - 01:17:29:16]

Emily said, one method I also use is to have a weekly, including recurring tasks on my Google calendar, but then use a notebook for daily to-dos. Yeah, I love that. Some people like my Google, I think I mentioned in the beginning, I don't like my Google calendar cluttered. I only like to see appointments, but some people, when you color code it really well, or you can have different kinds of calendars and you just click on them, you can put your time blocks in there, or your to-dos, or your priorities, like when you're doing your weekly planning, you could in that time block put what priority you're going to be working on. So that works really well as well.

[01:17:31:16 - 01:17:31:21]

Cool.

[01:17:32:23 - 01:17:42:12]

Awesome, awesome. Any other, Rich, did you see any other questions? Any other things? If you guys have any other questions, let me know. We're kind of coming to the 90 minutes, so I'm gonna respect your time for sure.

[01:17:44:03 - 01:17:48:23]

I did not notice anything else. Okay, awesome. If we missed anything, go ahead and throw it in the chat again.

[01:17:50:03 - 01:20:19:13]

Yeah, beautiful. I know, like I said, this is a lot, so I will send the replay out. I'll put it in Slack when it's done, but it'll be on that replay page. If you have the schedule page, Rich, do you mind just putting the schedule page in the chat one more time? The schedule page has everything you need. A link to the community, a link to the replay page, a link to if you wanna learn more about the action-driven collective, you can find that there. Like I said, we have all of these templates, and more in there. We do topical trainings like this once a month. And starting in June, I'm super excited. We're gonna do a series for hosting your own event. So it doesn't have to look like the Grow Your Biz without social, but like what is it like to actually host your own event? What would be the steps and processes to start that? And I would say even simple, just like a collaborative workshop, a day event, something like that. But we're going to, in June and July, work through that. Actually, June, I think we're doing another planning session, but July, August, and probably September, we're gonna have like a series on collaboration and hosting your own event. So I'm super excited about that. But we do lots of different things. Usually the topic last year, or last month, it was a member. So when you're a member in the collective, you also get an opportunity to share your Whitenstom insight. We did bookkeeping and financial growth and stewardship. And I'm not the expert in bookkeeping or accounting. So we had the amazing Danielle Fox come in and share more about that. So we have lots of great time. We pick the topics based on what you all need and what you all want. And I will link the spreadsheet. So the master link spreadsheet and those two CSV files for Asana in where the replay page is as well. So you can grab those if you didn't get them. If you have any questions as you're working through things, pop them into Slack. And we will see VIP years back here at 1 p.m. Mountain Time, 3 p.m. Eastern Time. Or we'll see all of you back here tomorrow. Tomorrow's our official group coaching call. So if there's anything you want to work through, any questions that you have that you wanna address, you can send us an email, info at redhotmindset.com, or just put it in Slack, let me know. And that's what that time is gonna be for tomorrow. I'm super excited about it. I have been, I'm just having so much fun. I hope you're having fun. I actually slept really well. I don't sleep well. I slept really well last night. I think it's just because we're having so much fun. So come hang out with us in Slack and we will see you again either this afternoon or tomorrow morning. With that, be blessed. Oh, I didn't pray. I'm gonna pray. So if you need to leave, go. I'm gonna pray for us.

[01:20:20:20 - 01:21:22:13]

(Laughs) Dear Heavenly Father, I thank you for our time together. I thank you just for letting us share and collaborate on what works back end. How can we organize our thoughts, our tasks, our goals? How can we do this in a way so that we can really focus on what matters, which is people. Serving others, doing what we're called to do in our gifts with our talents and alongside you. And I just thank you that we were able to come together today to actually talk about that and to figure out what would work well. I pray that everyone who is leaving today that they are excited, motivated to really dial in on what's gonna suit them best when it comes to their to-dos, their calendar, their project management system, how they're planning and doing their goals and that they will focus on letting you lead the most important part. So thank you. I pray that you'll bless each and every one of them and just help them, guide them, give them wisdom for that next right step. In Jesus' name, amen. All right, we'll see you all soon. Bye for now.