

Tiny Course Empire Podcast Episode 104: Creating productive workflows in your business
(four easy steps)

PLEASE NOTE: This is a machine transcription. Some punctuation and spelling weirdness are to be expected.

A few years ago I was working with a client to put together his big annual sale. He wanted to put one product up for sale every day during the month of December, and that meant creating coupons, setting dates and countdown timers, editing sales pages, scheduling emails, and a whole bunch of other tasks for every single day of the promotion. It was a lot, and there were many, many places where it could go wrong and where I could screw something up. I needed a system to keep track of it all. So I created a worksheet with places where I could fill in all of the information like the name of the product, the day it was on sale, the coupon code, and the link to the sales page.

Then I added a simple checklist so that I could keep track of what tasks I had already completed. Was the email scheduled check? Was the countdown timer added? Check was the coupon working? Check, check, check. I came across this checklist in my Google Drive just a few days ago and it reminded me that this process is one of the most impactful things that you can do for your business. To take those projects and those tasks that you do and to turn them into an organized and systemized workflow reduces the number of mistakes that you'll make.

It improves your customer relations it saves you time and it makes you more money too and it's something that you can apply to every aspect of your business. But most people don't know how to do it feels overwhelming it feels really complicated or if you're like some people I know, it's hard for you to even think in this kind of systemized, structured sort of way. This is episode 104 of the Tiny Course Empire Podcast, and today I'm going to teach you how to break any project into manageable tasks so that you can make your work and your business and maybe even your life more efficient.

It's a simple four step process and once you learn it, you'll be able to create productive workflows for everything that you do, from creating content to handling customer service issues to launching a new course.

Welcome to the Tiny Course Empire Podcast, a weekly show dedicated to helping you launch and grow your digital course business. Even if you don't have a big team or a six figure ads budget, we'll help you design smart systems, take consistent action, and achieve massive success on your own terms. Now here's your host, Cindy Bidar.

Hey, it's Cindy and thanks for spending a few minutes of your day with me. You'll find the show notes and the recommended resources for this episode at [tiny course empire dot com forward slash one zero four](http://tinycourseempire.com/forward/slash/one/zero/four).

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While you're there, be sure to download the online business Road map. This step by step plan will show you exactly what to focus on during this phase of your business. Whether you're just starting out or you're ready to scale, remember to hit the subscribe button to new episodes drop every Thursday morning. Next week we're going to talk about content, specifically what your content publishing style means for your business, but that is next week. This week is all about designing productive workflows so you can work less, earn more, and enjoy the freedom that having an online business can give you.

So let's dive in now I said that there are four steps to this process, and the first one is to optimize your work. That means you first have to decide what your work actually involves. That's a process in and of itself. You're going to start by brainstorming the steps involved what has to happen to get from here to a published blog post, or from here to a finished sales page, or from here to a new product that's all packaged up and ready to sell? What are the steps involved then you're going to put those steps in some kind of order and this is going to be think of it like a rough draft and that's OK You're just going to put them in the order that it occurs to you that you need to do them in we're not writing anything in stone we're just saying I think this is the step or the process that I need to follow.

And once you do that, work, the steps, do the process. Go through your step by step plan that you have created. And this is important. Revise it as necessary move things around, add more steps if you forgot something, drop a new step in there. Eliminate what you don't need. That revision process is how you optimize this first step in this systemization process that we're going through, and this is going to be slow going, and that's OK the goal here is not to get it done as quickly as possible, but to get it done as thoroughly as possible speed and efficiency come later. Optimizing is all about accuracy. Now you can use any tools that you like for this step.

I'm personally a big fan of index cards for this, so I like to sit down with a big stack of index cards and write down one step per card as I think of them. Then I can take that stack of cards after I've written all of the steps down, and I can shuffle them around and put them in some kind of order again, this is just my rough draft, but having them written on separate pieces of paper on separate index cards makes organizing and reviewing them easier, at least for me.

You could also use sticky notes or just a pen and paper or a Google doc or whatever works for you. Now, I went through this process with a coaching client recently. She wanted to create a product. She has all of the content already created, she just doesn't know how to put it all together in a format that she likes. So what we did is we sat down and did this exact optimization process we sat down and we brainstormed all the steps we just listed them out in no particular order.

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Then I helped her to think about them strategically which piece has to happen 1st and some of this is going to be really obvious you're going to say, well, obviously I have to open up a Word document, right that's the first step. Some of it's going to be a little bit less obvious, but start with what you've got just list them out in whatever order it occurs to you that you need to do them in and that's what I did with my client.

Then in the end, she had a list of five things that she had to do in order to turn her content into a product and that is her rough plan that she's going to follow. She's working on that. And then the next time we meet, we will revise that plan we'll review the action steps that she took. We'll talk about each one and we'll decide what needs to be revised, what needs to be moved around, what can be eliminated.

You know, maybe she doesn't need a video transcript or maybe she'll decide that if she doesn't want to do a slide deck, whatever it might be, some of those things will possibly be eliminating. And then she'll keep revising and keep eliminating and keep adding things until the process is as efficient as possible, and until the result that she gets at the end is what she's looking for, until it meets her expectations. Once she's satisfied with the process, then she can move on to the next step, which is to systemize it. In other words, she's going to turn this rough draft of steps into a more formal documentation of her project.

That's what I mean when I say I want you to systemize something, I want you to document it. By that I mean you're going to create checklists and templates and other tools that you can use to make sure that when you do this project again, when you create that product or write that blog post or edit that video, when you do that again, you're going to do it in the same way with the reasonable expectation that you are going to get the same results you got before. That's the whole goal here. O Let's talk about the checklists and the templates and things that you can use in this systemization process.

The very simplest thing and the thing that I want everyone to create in their business are those checklists. This is just a step by step plan that you have for doing any task in your business anything that you do more than one time. Hopefully has a checklist. This just explains all of the steps in the process. Now you can use screenshots or you can use video if that's helpful to you. I've created checklists in Trello. I have checklists in my project management software i have checklists in Google Doc. I have checklists on, you know, pieces of paper sitting on my desk it doesn't really matter where you use them, as long as you do use them so those checklists are the first step.

Then the next thing you can do to systemize your processes are to create templates that you can reuse again and again and again. The simplest ones are going to be just simple text templates i use a lot of text templates in my business. I use a template when I write a new email i have a new email framework that I pull up and that is what I use to create that

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email with. I have a new email framework when I send an email to six figure systems members or when I send an email to my affiliates. All of that starts with a template.

When I started this podcast outline today, I started with a template. When I write the show notes after I'm done recording, that's going to start with a template. When I host QA calls and I write the show notes for those calls. That starts with a template as well. Now I use a program called Textexander which lets me just type in a short text code and it fills in all of the blanks for me. O For example, if I type semi colon new OD into a text document, then a new podcast template with all of that boilerplate text already inserted is added to my text document, Then I can just go in and fill in the blanks it already has my intro, it already has the outline, it already has my calls to action it already has the correct formatting in it.

I just need to go in and fill in the details. But you don't have to use anything as fancy as text expander you can use a text file, You can use a Google Doc you can use whatever you like and just copy and paste that information into a new document when you're ready to use it. What you don't want to do though, is have to rewrite the same text week after week or day after day. That's why setting up templates is such a useful thing to do.

You can also make use of graphics templates. I use Canva for this i use Canva for my product covers. I use it for my QA call covers i use it for my PDF workbooks. I use it for slide decks, anything that has any sort of graphics in it i've done that in canvas so if I need to create a new workbook for example, I don't have to start that from scratch. I start with a template and I just fill in the pages with new content. The same for product covers it takes me like 3 minutes to create a new product cover because I use a template.

And the benefit, the added benefit of this is it also makes my branding more cohesive because every graphic is a match stylistically for every other graphic so you always know when you see a product cover from me that it's mine you recognize it because the branding is matching. You can use other programs for this of course you can if you use Indesign or Hotosho or Microsoft Word or PowerPoint or whatever your products of choice are that you are using, you can create templates in those products. You can also make use of project templates whether you're using Trello or Asana or Basecamp or any other project management system, you can create a project template that you can then just copy and paste the next time you do a similar project.

We use a program called Flolu for our project management system, and every new course and every workshop has a template i can just log into Flolu and I can click a button and all of the tasks that are related to that or that have to be done to launch a new project or launch a new course or to host a new workshop all of those tasks are already in that template they're already filled out.

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And then Rick and I, my husband, just have to go in and complete the tasks that are listed. We're not reinventing the wheel every time we have a new workshop or every time we host a new Q and A call, all of the tasks are there. We just go in and follow the plan that's the plan that we created and that we optimized and then we systemized it by putting it into our project management software as a template that we can use again and again and again. Like I said, the goal here is to turn the things that you do over and over again into a repeatable system so that you don't have to reinvent the wheel every time you create a new product or record a new podcast or write a new blog post, you want to be able to follow the process, and you want to do that because you know it works it's as efficient as you can make it.

Because you've already been through the optimization step, the next step in the process is to automate what you can now you're probably already automating a lot of things in your business. You don't manually send login details to every customer who buys a course, and you aren't personally emailing a link to your trip wire to everyone who opts into your email list that would be silly.

Those things, and dozens of others are already automated in your business, but there's also a lot of other tasks that you can automate once you have your processes defined and optimized and systemized. For example, you can batch your content creation maybe you sit down and you write all of your emails for the week, or all of your blog posts for the month, and then you set up your blog posts or your emails to publish automatically through your blog platform or through your email platform.

I do that on Monday mornings I sit down and I write all of my emails for the week and then I just schedule them to go out throughout the week so I don't have to log in and manually do that every day. You could also use a helpdesk software instead of your personal email, and you could set up an autoresponder to answer the most common questions that you get so you are serving your customers better by answering their questions ahead of time and you're also saving yourself some work on the back end.

Another thing you could do is you could set up your bookkeeping software to automatically download all of your sales information from PayPal so that you don't have to enter that information manually. Or maybe you want to create a system to automatically send a welcome package to your new coaching clients so you don't have to do that manually. Or maybe you want to use a calendar app to schedule meetings, or set up an email funnel to automatically promote your courses and your products. Or maybe use a scheduling app to automate your social media posts. It's really easy to think of automation as being useless when we look at this list I mean, after all, it takes like 2 seconds to click publish on a blog post.

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But a few seconds here and a few minutes there really do start to add up after a while. And when you combine that with the reduced cognitive load, it's a really big win. Remembering to do this stuff takes up space in your head, and that space can be better used for something else. So to get started with thinking about automation, I want you to look at the things that you're doing on a regular basis look at those things that you have optimized and that you are systemizing, and ask yourself is there a way to automate this so I don't have to think about it? Or is there a way to ensure that this gets done the same way every time? Then the final step in our four step process is to delegate and really delegation is just a more advanced form of automation if you think about it, it's taking the things that you do manually that you can't automate and turning them over to somebody else so that you don't have to think about it and so that it gets done the same way every time.

I want you to know two things about delegation though. The first thing is to notice that this is the last step in the process, not the first. I talked to a lot of people who want to start by delegating, and that's almost always the wrong move. It will cost you unnecessary money and honestly, it's probably going to hold you back. Yes, there are some businesses that can benefit from delegating right away, but for 99 % of my clients that is not the case. The better move is for you to figure out what you're doing and how to make it as good as it can be before you try to delegate it i know that sounds backwards, but trust me on this one.

The other thing I want you to know about delegation is that it's really expensive. If you don't have the revenue to support it, or if you don't have a solid plan for creating that revenue, then delegation is going to cause you more stress than learning how to set up your own email funnels will cause you. Delegation is not an easy button i know that there are some people who want you to think that it is, but it's not it's not a get out of jail free card it is a tool that you can use, but not until you're ready for it.

And I say this after having spent more than 10 years as a virtual assistant. I've told you the story before, but I had two kinds of clients as a virtual assistant. I had the kind who didn't need me at all, who could do everything themselves, but who wanted to free up time to do more important work. And I had the kind who hired me because they didn't know how to do the work and they just wanted someone else to take care of it for them.

I can tell you with certainty that 100 % of the time, the clients who didn't need me were the ones who were successful. The clients who needed me to take everything off of their plate were not. So don't skip the optimize, the systemize and the automate steps and think that you can shortcut the system by just delegating everything. I promise you, unless you have a boatload of money to spend and you are super skilled at high level planning and strategy, delegation is not the answer you're looking for. So why am I even including it in this list at all? Well, because when you get the optimize and the systemize and the automate parts done, and your business is running smoothly and you're making some money, then you are

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going to want to hand off some of those tasks and you'll be ready for it because you'll have all of your documentation in place and it will be easy to train someone to help you.

So when you're ready, here's how you decide what to delegate. You're going to do this in three rounds. In the first round, you're going to delegate the things that you're only going to do once. For example, if you're moving to a new course platform or to an email new email provider, or you're setting up a podcast, this is where you kind of get to skip the optimize and systemize steps because you're only going to do these things once and you don't really need to learn how to do it. The key is you have to already be making money in your business, though, so don't outsource this stuff if you have to borrow from the grocery fund to do it.

But presumably if you need to move to a new email, platform then you're probably already making money with email marketing. In that case, let somebody else handle that there's no need for you to learn to do something like I said, that you're only going to do one time if you can easily afford to delegate it. So that's the first round. Offload the things that you're only going to do once and that you don't need to learn how to handle yourself. Then the second round of delegating is for the things that you don't like to do and that you probably procrastinate on so these are things like website management, maybe it's customer service, maybe it's bookkeeping.

Again, you're making money in your business you're not borrowing from the grocery budget and hoping to be able to pay it back. So you've got some profits rolling in and you think to yourself, you know what? I really hate this bookkeeping thing it stresses me out, and I keep putting it off, and I could really use that time to do something more important, like creating a new course. That is the time that you decide to delegate your bookkeeping.

And the good news is you already have it optimized and systemized, and you've automated what you can, so delegating the rest is super easy, and it's a lot less expensive than it would have been if you had tried to hand it off at the beginning. So that's your second round at delegation is the things that you don't like to do and that you're procrastinating on anyway and the 3rd and final round of delegation is the things that you don't mind doing, but that you're not particularly good at so maybe that's graphics maybe it's designing sales pages, maybe it's editing video or your podcast, That sort of thing. Why would you outsource this stuff if you don't mind doing it though and if it's not taking up a bunch of time, Well, there's two reasons to make them better maybe you really don't do very good graphics and you want to up level your brand or maybe you have a vision for how you want your videos to look and you just don't quite have the skills to get there.

Or the other reason is because you want to spend your time doing more important things like working with clients or creating courses or taking a vacation. Maybe you've optimized

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the process to make it as good as it can be you've systemized it to make it as efficient as possible. You've automated what you can, and it's making money. Then it's time to delegate it. Now with that all said, there are some things that are not important enough to delegate, even if they seem like they fit in the first, the second, or the third round of delegation decision making.

But this is with a caveat. If you are making loads of money and you see a clear path for these things to make you even more money, then you can go ahead and delegate them you have my blessing. But if those things are not the case, then the things that you should not delegate are your logo. You don't need a logo designed. Put your name or the name of your website at the top of the page and move on.

You are not FedEx or McDonald's or Nike. Sure, I mean, it's nice to have a graphic that your customers can recognize, but it is the least important thing on your list of startup activities, assuming you are just starting your business. So don't even think about outsourcing this now. Like I said, if you're making seven or eight figures and your website and your brand are starting to embarrass you, then by all means get a new logo created website design.

Same story. If you're just getting started, install WordPress or sign up for Squarespace. Pick a template and go. It's good enough for now. When you hit high six figures and your website makes your customers question your skills because it's poorly designed, then maybe get it customized, But don't worry about it before then it's really not that important. Your content is much more important than the design. Always focus on that. Worry about your website design later.

The third thing that is not important enough to delegate is your social media. This is something that people think that they need to do, but they don't really have the time to do it, so they want to delegate it. And here's my take. You don't need it. Like, at all. If you like to do it, if you like to be on Twitter, if you like to be on Facebook, if you like to be on Instagram, do it. If you don't like it, or if it sucks up all your time and you get very little benefit from it, then don't do it at all. But do not throw money at it because someone told you that coaches or course creators have to be on social media or because you think that's the only way to get traffic to your to your sales pages.

It is not the only way. I recorded an entire podcast about all of the ways you can market without social media, and I will link to that in the show notes. But I especially do not want you to waste your time and your money on this one because it is not important enough to delegate. So those are three things that are not important enough to delegate but there are also three things that you, as the business owner of a small online business, should never delegate. 3 things that you should be doing yourself at this point in your business.

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Those three things are sales page writing, course creation, and email marketing sales pages because unless you are selling a really high ticket product, it will almost never be worth it to delegate or outsource this. You will always do a better job than the person you can afford to hire again, unless you're selling a 10.000 thousand or a 20.000 thousand or a fifty thousand dollar coaching program. Then, if that's the case, you can afford to hire a top copywriter. But if you're selling tiny courses, or if you're selling a membership, or if you're selling printables, you can't afford to hire a copywriter who's going to be any good. Just write the sales page yourself you will do a much better job.

Course creation, Same story. You will always do a better job at this than the person you can afford to hire. Unless you've got 30 or 40 or fifty thousand dollars to drop on a really high end course creator who is going to write you a phenomenal course, write it yourself. You will do a much better job of it, I promise. Email marketing. Same story. At least email marketing the way that I teach it now your subscribers want to hear from you are the face in the voice of your business, and email is the way that you make that connection and build those relationships.

And you can't do that if you're outsourcing your content creation. Again, if you're already earning high six or low 7 figures, you can ignore this advice. Go ahead and outsource your email, marketing outsource your sales pages, because most likely you have more important and more impactful things to do with your time, like working with clients or developing high ticket programs or managing your team. But if you are just starting out for anyone else who runs a small business like mine, keep those things on your own task list because you will do a much better job of it than anyone else will.

I told you that this is a simple four step process, and it is, but the key to doing it is to put your blinders on you have to be able to focus only on what you're doing right now and ignore everything else and that is hard for some people to do. My client who wants to optimize her product creation process isn't looking at her sales strategy right now, or her email, plan or even her course platform and how she's going to set that up. She's only looking at getting the product packaged.

Everything else is a different process, and those will come later. If you're working through the steps and you find that you're getting confused or you're getting overwhelmed, ask yourself if you have wandered away from the original process, because that's almost always the case. One more thing I want you to know. You don't have to go through all four steps every for every single process.

Maybe you're going to find out that you don't want or can't automate something or maybe you decide that you really don't need to delegate a process in that case, you can stop at systemizing that's good enough. So optimize the process first. Make it as good and as

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efficient as you can make sure it works and that you get the results that you expect, that your product is finished or that your podcast is published, or that your video is edited, whatever. Then systemize it create the checklist, create the templates, Document your steps. Next, ask yourself if any part of it can be automated. And finally, when you're making money and you have other things to do with your time that would make more sense, you can consider delegating it.

Turn those systems over to someone else and let them handle it for you. That's how you create better, more efficient, and more productive workflows in your business. And if you want my workflows that I've already optimized and systemized, I'd love to invite you to join me inside 6 Figure systems. This kind of system development is what we do. You can check us out at sixfigure.com and I hope to see you on the inside.

That's it for me this week i will be back next week to talk about how your content style impacts your business and why that even matters. And maybe it matters more than you think it does. Have a terrific rest of your day and I will talk to you all again next.