

Bombchelle



RISE talk: Systems for Creative Businesses

First off! You can grab links to extra resources & download a copy of this worksheet here: www.bombchelle.com/rise

What are systems?

Here's what the [dictionary](#) says about systems (or, the two applicable definitions anyways):

- an assemblage or combination of things or parts forming a complex or unitary whole
- any formulated, regular, or special method or plan of procedure

Most of what we're going to talk about will be meaning #2, but we're also going to talk about meaning #1 as it plays into a systems mindset when it comes to your business.

Cultivating a systems mindset

One of the ways you can make things much easier for yourself further on down the line is to start practicing your systems mindset as soon as possible. You want to be really mindful of what can be duplicated and/or handed off further on down the line, and start collecting the information you'll need to do that - even if it's just a little bit at a time.

Whenever you're working, ask yourself:

- Is this something I'm going to be doing over and over again?
- How can I make sure I'm not reinventing the wheel?
- How can I make this just a little easier next time I do it? (*Example: storing the password for your InstantTeleseminar or Satori account in a passwords document in Google Docs, so you don't have to do the "wait now, what password did I use here?" dance over and over again.*)
- When it comes time for me to outsource this task, how am I going to explain doing it? (*Example: writing down a task list, or recording a screencast, or some combination of the two...*)

It takes practice, sure, but working on keeping these questions in mind as often as possible will make it easier for you in the future. If you need to, you can even keep this page by your desk as you work for reference.

The other piece of this is to be aware of the different areas of your business (the different systems) and how they play into each other. It can be difficult to get the hang of, but when you're looking at your business, ideally, you'll be noticing:

- The bigger picture of your business as a whole (where you're at now, where you want to be in the immediate future, and where you want to be in the further-off future)
- What the different areas of your business are (the work itself, marketing, content creation, client follow up, and so on)
- How each of those areas/systems plays into that bigger picture of your business (if you want to ramp up your business quickly, focusing on marketing and promotion will take priority in the immediate future)

(This is where there's going to be a hopefully-helpful whiteboard drawing that'll give you a visual example of what this looks like in practice!)

Three must have systems

Marketing and promotion

We can forget to do this if we don't systematize it and clearly, that's a terrible, *terrible* idea, because y'all, without marketing & promotion, you've got nobody paying you, and without anyone paying you, you don't have a business. I say "marketing and promotion" instead of just "marketing", because I like to split this area up into two categories:

- **Marketing:** I categorize marketing activities as things that can get you clients *now* or in the immediate future – emailing someone and asking to work together, submitting a pitch on a gig, etc.
- **Promotion:** I categorize promotion as activities that are building authority/credibility so that you'll have clients & customers coming to you further on down the line (instead of you having to seek them out). Think: blogging, guest posting, webinars and teleclasses, getting interviewed or getting media features, etc.

It's a pretty arbitrary distinction because the words are so similar in meaning, but however you decide to categorize it (outbound vs. inbound could be another way to think of it), it's a good idea to make a distinction in your efforts between the two areas. When you're just starting out in business, you want to do more "promotion" related activities, but you also can't neglect "marketing". It's a good idea to start out with a 75/25 blend, and then as you get more regular customers/clients and referrals coming your way, you can switch to 50/50, and eventually more like 25/75.

Action steps: Make a list of what you're regularly doing for marketing and promotion, making sure to consider what's actually got results for you. A lot of activities are touted as one size fits all when they (shock) actually aren't. When you have a list of things that have *actually worked* in generating more customers/clients/profit, decide which ones

you enjoy enough to do regularly, and how often you'll do them. Then make it a point to schedule them into your calendar on a regular basis.

Client or customer follow up

(We're going to be workshopping client/customer follow up systems live during the talk, so be ready to volunteer!)

People who have already paid you money and are happy with the results, service, & experience they got are like, a kajillion times more likely to work with you again in the future. *(I'm not a statistics expert, don't give me that look.)* It's a much better use of your time to make sure that your current clients are happy and that your past clients know they can work with you again, than to spend time on getting new people to work with you. So many service providers let this slip through the cracks because it's easy to assign a lot of emotional baggage to it – “I don't want to bother people!” *(I say service providers, but really this works for selling products too, though your systems for it will look a little different.)*

Seriously. If *you* gave money to someone and you were ecstatically, *pee-your-pants* happy with the results, would you be cranky if they said to you “hey, I have this special thing for people who have already worked with me, you can learn more about it here...”? Obviously this only works if you're doing your best to make sure that all of your past clients & customers are ecstatically, urinatingly happy with their purchase, but I'm going to assume you're doing that anyways.

Here's some ideas for how to get started with this:

- having special “client only” packages at a reduced rate not available to the public
- create a service package that's a natural follow up for the work you've already done with a client that you can offer them 30/60/90 days down the road
- having free monthly or quarterly teleclasses/webinars/brainstorm chats with past clients (invite all of your past clients on one call)

Action steps: Set up an easy to use CRM like [Contactually](#) or [Ming.ly](#) and put all of your current & past clients in it so that you can follow up with them regularly. If your business is more product based, think about ways to add in some follow up – whether personalized (if your customer volume is lower and that's doable for you) or automated. You can send people a discount for their next purchase a week or so after they buy something, for example, by integrating your shopping cart software with a mailing list service like [Aweber](#) or [Mailchimp](#) and then setting up an autoresponder.

Your work or services themselves

If you don't have systems for your work, then you're missing a lot of opportunities. You're probably spending more time than necessary doing the work, and not having defined systems and processes also means that it's harder to streamline

things than it should be. Another unintended side-effect is that not having systems can mean that you're spending a lot more time than you think you're spending on all of the various pieces of your work, which means that your rates might be inaccurate, which can lead to you *severely* undercharging. **Working 60 hour weeks and still feel like you're not making a profit? This could be why.**

Action steps: Start creating task lists for the work you do the most often – whether that's making something by hand or a service you provide for clients. This can be as simple as a list in Google Docs or Evernote, or more complex like a project or task list template in your task management tool. Make sure you aren't skipping any steps! When you're doing your work, having this list will be useful because you won't have to pause & think about where you're at and what's next – you'll be able to just look at the list and know. The other great side effect of this is that it makes it easy for you to spot places that are ripe for streamlining – pieces in the process that are a little clunky.

Bonus homework: Fill out a systems template of your very own (& an example!)

Here's an example systems template:

Area: Promotion

Name of activity: Guest posting

How often: Once a week

One-off setup tasks:

- Research 20-30 blogs to guest post at and create a document with a list of all of them/ any pertinent information on submission guidelines

Task list:

If necessary, you can add a note next to each task about who's doing it (if another team member is doing it, for example).

- Check research on blog & submission guidelines
- Look at last 4-5 posts & any popular posts to help brainstorm for ideas
- Decide on post topic/title
- Outline post
- Write post
- Edit post
- Submit post
- Promote post when it comes out live
 - Twitter
 - Facebook
 - Newsletter or email

Now it's your turn:

Area:

Name of activity:

How often:

One-off setup tasks:

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Task list:

If necessary, you can add a note next to each task about who's doing it (if another team member is doing it, for example).

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