

# Wealthy Web Writer: The Power of Process

Speaker: Heather Robson

## Transcript

Good afternoon, welcome web writers I hope you are all doing well and thank you for bearing with me with rescheduling of this event I have some family matters I had to attend to you last week so I appreciate everybody's patience and willingness to wait a couple extra, extra days to learn about the power of bringing processes in to your business. So I'm Heather Upson Managing Editor of wealthy web writer and today I'm going to be talking about processes versus systems, how processes can help you leverage your time and also just have more confidence within your business, working with your clients working on projects, all of that good stuff. I'm going to go through five processes that I think every white writer should have articulated documented and in place, and I'm going to give you enough that you can start using these processes today.

And then we'll finish up talking a little bit about how you can build and use your own processes. So let's go ahead and get started systems versus processes so last December I did a webinar event like this one, talking all about systems and the power of having systems within your business. But systems are built, often out of processes so I thought it was probably a good idea to talk about the processes that go into making systems. And so one of the first things that we want to cover is how are these two things different, what makes something a system and what makes something a process. So a system is complex, it is often made up of multiple processes and systems are meant to tackle strategy problems that means when you set up a system, you're striving to solve a multifaceted problem or to achieve a long term goal, and not every time but most of the times, systems perpetuate, by which I mean once you implement a system.

The way that you get the most success from that system is to just keep using it just kind of keep on truckin with processes on the other hand, fulfill a singular purpose and you can link together several processes to create a system, but processes tend to attack to tackle tactical problems, little bit of a mouthful there, which means that they are more oriented towards short term problems short term goals, providing you with clear tasks and next steps, and your process has a clear

beginning and an end. So you may be using several processes, and your systems and there may be a time when it's like okay, it's time to use this process. But that process is going to have several steps and then when you get done with the steps, you're kind of done with that process for the moment, whereas a system like I said often tends to perpetuate or repeat, on and on and on. If you want to get the most benefit from it. So how do processes help you leverage your time. I want you to imagine a scenario. So a client has a potential client, not a client yet they've called you up they've said I found your website I saw you on LinkedIn. I read something that you wrote that I was really interested in. Can we have a discovery call and you say, Yes, of course we can have a discovery call. So now you have to get ready for that discovery call and you have about 18 hours from when they say hey can we have a discovery call when you schedule the discovery call so you've got 18 hours to prepare.

So what do you do, what questions are you going to ask, what is your goal of that call what are the things that you need to complete before that call in order to feel ready for that call. There are a lot of moving parts and getting ready for a discovery call, and if you go into every discovery call like it's your first discovery call the time that you need to prepare for that call is kind of amorphous it's really unknown. On the other hand, in Scenario B if you have a process in place, same situation, you get that discovery call request, you have about 18 hours to prepare you know that you have a five part research process that you like to do before jumping on a call with a client, you have a list of pre established questions and you may go through and highlight the ones that are most appropriate to this particular client. And you know your goal coming out of that call, so the time needed now to prepare for that call is simply one to two hours and you know that.

So, in Scenario A, you have to pause and think, Okay, I've got a, I've got a call. What do I do, what do I need to do, how do I get ready for this, and Scenario B, you're much calmer, I've got a call, I know I need to do some research, I know I need to figure out which of my pre established questions, I'm going to ask on this call, and I know what my goal is for this call because your goal on most discovery calls is going to be very similar to figure out the client's needs, their pain point, and how your services can help them answer those needs and relieve that pain point. So one has kind of panic there's some nervousness, you really don't know how much time you need to put in it. The other, you just know sometime between now and tomorrow afternoon, I need to block off one to two hours to get ready for this call. So processes give you time. That's the great thing about them that's how

they help you leverage your time as they establish how much time it's going to take to do things that in your business, you're going to do again and again and again. So you know going into it, how much time it takes, you're always prepared because you know what the steps are. So you're always starting from this place of feeling like yes I know what to do next, that provides you with confidence, puts you at ease, which is very attractive when you get on the phone with your client makes them feel like you're in control, you're a professional, you know what you're doing. And basically what you have done to take this thing that can kind of be unruly and a little bit nerve wracking, and to pull it in and make it just take a little bit of time, and to get more out of that time, then the you know kind of ballooning time and the other situation is you've just codified each step that goes into the process that you're going to be doing. So I have five processes that I think most writers can benefit from using and I've outlined, my approach to these processes which may or may not work for you. Processes are very unique. It's nice to have a starting point, it's nice to talk to somebody who's used the process to find out.

Yeah, what are the steps they go through what do they do for that process, you can try it the way that they do it might be my process might be Nick husband's process could be, you know, Christina Gilkes process many courses, but once you hear the process, you try it out and then you kind of think, Okay, how did that work for me were there points that I kind of stumbled on, and I'm getting ahead of myself because I'm talking how to about how to make your process which we're going to do after we look at these processes, but I just want to emphasize, these are my approach these are my processes for these five different things that happen over and over again in a business, you are welcome to use them exactly as I present them present them, or you can change them, however best suits you.

So the first one is to have a client intake process and this one's really important because this is one of those moments where we really need to be at our best, we need to be putting our best foot forward, we need to be relaxed, we don't want to seem, we want to be professional, but we don't want to seem like we're performing or trying too hard, we want to come across as confident and authentic, and to do all of that because this is often a moment, particularly if you are new to landing clients where you have a lot of nerves and you have a lot of self doubt, so the client intake process can kind of settle all those nervous feelings down. So this process when do we use it we use it for discovery calls when there's something that you do, there's a process before the call process while you're on the call, and

the process, after the call, and that all goes together to create your client intake process. So before the call, you want to do some research so that you come in knowing something about the client about their product, about their industry, about their online presence, maybe even a little bit about their market, so you're going to visit the client's website and you're going to spend a little time poking around there, you're going to find as you go through there you're going to be making a list of things that you think they're doing really well on the site, and then you're going to be looking for gaps things that they could immediately make stronger or things that might be missing that you could help them add through your services. Now the reason we want to include good things and gaps is we always want to be able to kind of soften the blow when we say you know I see this as missing from your site, it's really nice if we can talk a little bit. First in a complimentary way, like you know your, your site has this really beautiful consistent brand throughout I just I love the colors I love the feel that it evokes.

But I noticed that you don't have a signup process on any of the pages except for your homepage, and that might be reducing the number of people that are subscribing to your email list. So you talk about the good stuff, but then you let them know the things that you have seen that could help them do better. You're going to read a few of the key pages you're going to read their homepage again taking those notes, you're gonna read their about page and kind of get familiar with how they are talking about themselves and how they're connecting that to what their clients, their customers need. And you're going to read some of their content. If they have an email subscription, you're going to sign up for that and see what happens. There are often a lot of gaps right there that as they start talking through their pain points on the call might be answered by a smoother signup process. You're also going to visit at least three of their competitors sites and see what they're doing what they're doing that similar what they're doing that's different. And you might take a little bit of time and read some trade publications or blog posts or some news that is within that industry.

What that's going to do is equip you to go into the call with a lot of information that is in your mind so you're not going to have to work from a script, you're going to be able to kind of relax, ask them questions, and you're going to have all of this stuff that you all this information that you've gathered and kind of assimilated and so you're going to be able to speak very intelligently and off the cuff, about what is happening in their industry what's happening on their site, and the things that their competitors are doing, that they may want to refer. During the call, you're

gonna verbally establish a goal with the client at the outset of the call so you're gonna say something like, so what I do is, on a call like this, we're just gonna I'm gonna ask you some questions I'm gonna listen really closely to the answers, we're going to try to zero in on what's going on and what you need, and then I'm going to figure out whether or not I can help you. And if I can, you know, we'll talk about what that looks like, and if I can't I'll see if I have somebody in my referral network, who I can connect you with, who may be able to offer you more of what you need than what is in my wheelhouse, because you are not the perfect fit for everyone and that's okay you actually want that you if you're trying to serve everyone trying to be all things to all people, chances are that you are working with clients who may be a little tough to work with them. Whereas if you're really zeroing in on good fit clients, it means that you wake up every day excited that you get to work for these great people doing things that you believe in, so we want to err on the side of we don't work with everyone. We serve a very specific group of people. So once they've said okay yeah I understand that's how the call works then you're going to start asking some key questions and these are going to be different from potential from potential clients or potential client. If you have somebody that's come on and says you know we, we know that we really need to boost our brand awareness and we really want to have a better document and content marketing strategy that is a different conversation than a client who says, Our website's just not working for us and we're not sure why. There's a whole different group of questions for each of those. You will probably start to put together, it's a good idea to start to put together some of the basic questions, you know, how are things going on your site, what do you like about your online presence, what do you feel like it's missing. What brings you to this point right now of trying to fix whatever it is that seems to be broken. You know what, what is it that needs to change for you to feel like this is successful, those kinds of questions. You may also ask things like what market, are you serving Tell me about your product. All of that kind of stuff but start to develop a master list of questions, and after every call that you're on if you've asked me questions during the course of that call, add them to your master list and then like I said you know you can print that master list out and just kind of highlight the ones that you want to ask during that particular client call your goal now is to zero in and find their pain point, what is it that's really brought them to this moment of saying, we need to fix this, we need to do something different. And as you're zeroing in on that pain point it's really important to try and listen to understand, that means asking follow up, follow up questions clarifying questions, you'll find yourself saying things like, okay, so if I hear you correctly, you're saying, and then summarizing back to

them what they've said not the exact same language but giving them the feeling that you've understood or giving them the option to clarify further if you're still a little bit off track, but you're getting on the same page with them fully understanding their pain point. And then based on what their pain point is you're going to determine if you can help them. Now, what that means is, if you determine that what their pain point is, is that their website is, you know 12 years old and they can't update it easily because they're still functioning on, you know, a hand coding situation and they have to bring in a web designer each time they want to make even the simplest of changes. What might need to happen there is they may just need to update the structure of their website before they start looking at making changes to their marketing materials, and that might not be what you do and that's okay. So you might in that situation say something like, so what it really sounds like the first step here is, is to update the structure of your website. And to do that we would need to bring in a web designer. And once we have a web designer, it would make sense for me to help out with the copy. So that might be how that conversation goes on the other hand, if you determine that they just aren't getting a lot of traffic and you've kind of looked at their site and they just don't have any content they have like four static pages that rarely change, you might say, so what I'm hearing is that you really want to see more traffic to your site, you want to see more brand awareness, and I can definitely help you with that I can help you put together a content marketing strategy that's focused on search engine optimization so you get more organic traffic. And I can also help you develop a social media presence which is going to bring traffic to your site as well. So, now that you've determined if you can help, and that you want to help. You're going to outline the next steps for them, so you're gonna say, you know, I feel like I've got a good understanding of what it is that you want to accomplish, and I definitely feel like my services are a good fit for that. So the next step is for me to put together a proposal of how we would best accomplish that and send it over for you to review, ask questions, approve, I will have that to you in 24 hours 48 hours up to you how long it takes to put the proposal together, and then we can hop on a call, and discuss the details of the proposal and move forward from there. Does that sound good. And if they say yeah that sounds great, that you know exactly what you're doing next, which is putting together the proposal. Okay so after the call, provided that you didn't just say, this isn't what I do. And, in which case, after the call might be to check with your network and see if you can connect them to someone who can help them better than what your services could do, but if you've identified that your services are the best option for them. Your after the call process is going to be to put together a proposal. So

you're going to summarize the key points that you talked about on the call, and you're actually going to include that, at the opening of your proposal, you're going to create a plan to help them achieve the goals that they want to achieve and you're gonna put all of that together into a proposal, send it to them by the time you promised to send it to them. And then once you send it to them, set a reminder to follow up with them two days later, people get busy and they may be looking forward to reviewing their your proposal, but they may have a bunch of fires that they're putting out a bunch of stuff that they have to get done. And, you know before they know it five days have gone by and they haven't even opened your email. But if you send them a follow up email just two days later, saying I just wanted to confirm that you received the proposal. Let me know if you have any questions about it or if you'd like to jump on a quick follow up call to talk through the proposal, points. And that is more or less how the client intake process goes. Now, I'm betting, some of you are thinking okay yes but how do I put together that proposal. I've got you covered there in two days on Thursday we're doing a monthly member update webinar, and I'll be talking about what goes into a proposal then. So if you are interested in learning more about putting together proposals I hope you will join me in two days. Alright so the next process that I think is really beneficial for writers is the project kickoff process. I'm gonna have a little drink of water. Alright so, proposals gone out. They've come back and said, Yes, they've signed the propeller signed off on the proposal they've paid their first payment. And now you're ready to start the project so this is also another moment where a lot of writers are like, Okay, I've landed it, and I've gotten paid and now I have to deliver and what do I do to get this thing going. And this is where procrastination, often sets in which is actually one of the ways that processes can really help they can eliminate that need to procrastinate by giving you clear next steps. One of the things that I do is I do put together, kind of basic processes for the most common project types that I work on, and just kind of a summary of, you know, what are the key things that need to be in this. And when you start doing like say you're writing, you know three blog posts a week for various clients, you're probably not going to check back on your blog post process because you've got that down. But let's say that you pretty often write landing pages for clients, but it's something that maybe you do six in one month and then it might be four months later before you do your next batch of six, and then four months later, it might be handy to just kind of whip out your little, you know here's, Here are the key components of a landing page. Here are the things that you really just cannot miss here is what each of those key components should do here are some, you know, different approaches that work really well so you might

just have a document on your computer that just kind of talks you through just your own notes your own take on working on that project. And so if it's a project you haven't done in a while, the first thing that I do in the project. Kickoff process is review the project type. If it's a project that's brand new to me, I go out online, and review the project type there, and just find what some different experts say about that project and make sure that I've got a good handle on the structure of the organization. The key elements that like if it doesn't have the critical element. The whole thing's gonna fall flat. I will at this time, during the project kickoff process also gather materials from my client so I might be asking them things like you know do you have any customer personas that I should be reviewing. Do you have any customer testimonials that I might be able to include. Do you have a style guide that I should be reviewing, do you have competitors sites that have done similar things that you absolutely love that kind of stuff so I'm going to gather all those materials. As part of that when they send them to me. And this sounds like a no brainer but I've made this mistake, more times than I can account open those attachments, attachments, immediately, review them, make sure that what they sent over was what you were expecting, see if anything's missing. I can't tell you how many times I have had a project running, and they've sent me the materials, and I thought okay great, I have the materials but I'm not starting on that for five days and then I don't open the attachment and then five days later, I open it up and realize they sent me the wrong thing. And then I have to reach out to them and say, so this attachments not right. And somehow, it being five days later it just feels embarrassing on my part, it feels a little bit unprofessional, whereas if it's like the same day. Great, thanks for sending over the attachments I noticed that you know you sent this attachment and I was really expecting this. Can you send that over when you have a minute, you're on top of everything you're building your own credibility you're showing them that they can 100% trust you, so open and review those attachments, right away as soon as you get them as you go through all these materials that you've gathered, you want to start writing down questions that you either need to ask your client to answer or that you need to get answered through your research. And then you want to set some project milestones, if it's a big project. So if you're writing a single blog post you probably just have a deadline for that but if you're putting together an entire website. We're developing a content marketing strategy. Those are bigger projects and you're going to have multiple kind of check in points with your client to make sure that they understand what's happening that you're on the same page. So you want to set those milestones up. The other reason that you want to do that is that each of those milestones then becomes its own deadline. So yes, you have the

deadline for the project. But if you're going to finish you know if the projects, the three month three month project, and you've set a milestone to finish your research in two weeks, you know, in two weeks time if you haven't even started your research that you're now lagging behind a little bit and you need to work on getting caught up. So this keeps you from having that terrifying situation where you're like, I'm going to have to be up for three days to finish this project on time. And can I really do my best work if I'm not sleeping for three days. No you can't. So those project milestones on big projects can ease the stress and really help you do the highest quality work. And then once you have those project milestones set, you want to send them over to your client and just say, you know, here's what I'm looking at for different milestones, does this look good for you. Do you have any feedback for me. If you have questions that you need your clients to answer. You're also going to want to send those at that time to pretty early in the project so everything is moving forward. All right, once you've gone through the kickoff process. The next part, that's also really handy to have a process for is the research part. So when you're researching a project, the research stage is. Oh, I have heard writers say that they spend half their time on research. I've heard writers say that they spend about 25% of their time on research, I consistently fall between those two marks. It's kind of funny I spend the bulk of my time on research and revision, and the actual drafting process is just this kind of little sliver in the middle. And so for the research process what I do for a big project in particular is I started out by reading broadly on the topic. And so I might take just an hour or two and just kind of put in broad search terms and just go through and read, you know, two or three of the articles that are appearing on the first page of Google for that search term. And so for example, I was doing some research on a, on a product on a product on a program called Alpha fold, which actually predicts protein folding, which is not something I was super familiar with at the beginning. So my first couple of hours of research were just like what are proteins and how do they fold up and how do proteins behave and then, you know, more into why are protein fold Why is protein folding so hard to predict and what is alpha fold and looking at all of that stuff. Once I've done that broad research for an hour or two, I will actually sit down and set a timer for somewhere between 10 and 30 minutes. And I will just do a brain dump. So I'm not looking at any of the research I've done all of this reading, and then I do a fast rate. I like i said i set a timer and I just write without stopping. On the topic for about 30 minutes. What I discovered from the past right is what questions I still have that I haven't answered yet. Sometimes I'll discover connections that I'm already starting to make that I know are going to be useful in my drafting process. Occasionally I'll start to get a feel

for the logic of how I want to order the project. So after the fast rate, I usually am able to put together a pretty solid outline with my gaps, what are the things that I don't know yet that I am going to need to know in order to write a good piece. So based on those gaps. I'll go do more research I'll gather more proof. I'll find holes, things that I just don't know and then I'll get really granular and start looking for very specific studies or stories that are going to be able to add some life and some color to my writing. At this point I'm also going to consider if it's going to be useful, and if it's in the budget to do some unique research so unique research is going to be interviewing an expert, having a conversation with somebody in the field. That's going to be you know you're going to ask your own questions and so what that's going to bring to the article isn't going to be found in all the other articles that are out there. Or if you're writing a sales piece, it's going to make that sales piece more credible and kind of set apart from other sales pieces that are out there. You could also do surveys, you could do interviews with customers. If your client does some data acquisition, you could look at the data and kind of do some parsing of the data to do some, some unique research there. So consider if unique research is in in the scope, and how much it's going to bring to the project and how valuable that's going to be, and then discuss maybe doing that with the client. So that's my research process pretty simple and straightforward. Then there's the revision process the great stuff really happens during revisions like I love drafting, you do all that research and you've got all these ideas in your mind and you sit down and you start writing and you get into flow state and it's wonderful and it's magical. And sometimes you get some really great gems from that but oftentimes, it's the polishing process that happens in the revision stage that really makes your work go from good to great. So when we do this obviously once your first draft is complete. So I look at the revision process actually is three separate stages, there's the actual revision and then after the revision there's editing, and then after editing, there is proofing. So revisions are very high level. At this stage, you're really thinking, What can I do to make this better, like it's here, but what can I do to make it better. This better so you're not trying to fix anything you're not fixing grammar, you're not necessarily clarifying things, you're thinking, you know, does this need another story. Does this need another layer of proof. Are there ways that I can set this apart, do I need some graphics in here. Do we maybe need a video, what is missing from this piece that my reader is going to be thinking, Gosh, I really wish the writer had covered this as well. At the stage I'm also going to be thinking about the order is my order logical, does this flow well, and without bumps, for the reader does it leave the reader, feeling like they have to back up and learn something before moving forward, we really want

it to make sense. A, B, C, just a logical progression. Is there anything that I can do to make this more engaging. Do I need to make the writing more conversational. Do I need to I mentioned, you know, bringing in, like, graphics, charts, videos, maybe I need an infographic in here, anything that's going to really get the reader to lean in and be taken in with what's happening, and at this stage I will also do what we interview a, I call it a Cuba review where I look for things that are confusing, unbelievable because I haven't backed them up with enough proof, boring, which usually means I'm just going on and on and need to trim stuff way down, or awkward, you kind of stumble when you read them, so I'm gonna be looking for those things too. And I'm just going to be noting those things because I'm going to attend to those things in the next stage which is the editing stage. So during the revision stage, I might be pulling everything I've done apart and putting it back together in a different way, I might be adding new things. You know I might. I've had times at the revision stage when I get, you know if it's a big project I get two pages in and I realize, oh this is actually the idea that needs to be the whole focus of this and then I scrap everything and I come up with a new draft that doesn't happen very often but it does happen and it's good to be open to that. Once I've gone through all of that revision process, then I go through the editing process and this is where I'm looking at sections and paragraphs to make sure that they are clear that they are concise that they're well formatted. Sometimes I might think, oh hey you know as I read through this paragraph, it's really big and long, maybe I can break it apart into bullets or maybe I should be breaking it apart into, you know, separate paragraphs. I'll pay a lot of attention to the voice and tone, at this point to make sure that I'm being consistent, that I'm being human, that I sound like I'm talking me to one person instead of me to a group or a group to a group, and I'll make sure everything is really easy to read. One of the most important things that you can do during these this part of the revision process is to actually read your work out loud, and you will discover so many ways to improve the flow of your writing, when you read it out loud at this stage, and then I'll also be addressing all of those little cube notes that I made, hey, this section is boring I either need to cut it way down, or I need to make the pacing better, or I need to make the ideas clearer. A lot of times when something is boring, it's because it's a little bit confusing. I'll find those things that are awkward and smooth them out. Hopefully, during that Cuba review, I won't have too many things that are left over that are still unbelievable because that's one of the things that I'm doing to make the piece better during the revision process but I'll still be looking at things where maybe I need to bring in a source, or maybe I need to tone down a claim, and make sure that it's backed up a little

bit better. Those kinds of things. And then once I'm done with the revision process I'll go into the proofing process, this is where I'm looking to really polish it and make it gleam. I'm looking for typos, I'm looking for grammatical errors, I'm looking for dropped words, I'm looking for. I say, your common errors. So we all have things that we do in our writing, I blame muscle memory, I don't know why but when we type. Different people tend to have different mistakes that they make. And I've seen this over and over again as an editor I start to get to know different writers and realize okay this writer tends to make this mistake so I really need to watch for that. Me, I tend to use you and I should use your and I tend to use your when I should use you, so I go through I have to go through all of my writing, and check every you and your and make sure it's what I meant it to be. Sometimes I have to add an art sometimes after dropping our, but that's one of my common errors that I really have to look for. And another thing that I tend to do is leave off contractions so if I'm saying can't, for whatever reason, when I'm typing fast. My brains like Kans good enough, we'll just keep going and so I have to go through and, and look at words that are typically contracted and make sure I didn't completely change the meaning by saying Can when I meant can't. One of the most effective ways to prove your work at this level is to read it, sentence by sentence from bottom to top. Your brain is wonderful at conserving energy and so when you're reading from top to bottom. It's like good enough, we know what we mean. And so it misses a lot of little errors. If you read it from bottom to top, though you bump it out of that ability to kind of fill in those blanks, and you'll catch a lot more errors that way. So that's a good thing to bring into your proofing process. Alright, and the final process, and this is a super important one that a lot of writers miss is the project wrap up process. So you've gotten final approval, your client is happy with the work here, do a little celebration. Your next step is to send them the final invoice you don't want to delay on that just get that invoice out to them. After you do that you want to sit down with yourself and do a little internal debrief. Were there any steps that you missed along the way or any moments during the project that you wish you had handled differently. Were there any parts of your processes that need updating. What did you learn from the project. What did you love about the project, what are you proud of about the project. What were the hardest parts of the project, were there any points where the project went off the rails and you had to bring it back on the rails that you could have avoided that happening. So this little internal debrief is just going to help you just get better and better and more professional over time. About two weeks later you want to reach out to your client, and see if they've implemented the copy if they've deployed it published it, and how it's doing. Are they getting a

response to it. Are they happy with what they're seeing, is it too soon to tell all that kind of stuff. If you get a positive response at that moment where they say yeah we've got it up on the site everybody's really happy with it. We're getting lots of comments getting lots of social shares and positive feedback can come in a lot of different ways, that's a signal to you that it's a good time to ask them about getting a testimonial. If you love working with that client, it's a good time to say, you know, I do have some spaces in my calendar. And I'm wondering if you know of any other companies that have a culture similar to yours. I really enjoy working with your company that maybe also have a need for my services so you're going to ask for referrals, and it's also a really good time to say you know I'm so happy that you like how this is going. I have some ideas for this next thing that we might do. And doing that and could line up new work. So having this project wrap up process is really going to help you nurture those relationships with your clients, it's going to help you, like I said, get better and better at what you do and get more and more professional and make these processes better and better so that they continue to leverage your time and streamline your work and boost your confidence, and it's also going to set you up to get more work in the future. Alright, so when and how to make your own processes. So these are five processes that you can start using right away, and like I said you tailor them however you need to for your own business, but there may be times when you encounter a need for a process that we haven't covered here. So when a process is a good idea to at least consider whenever you have multi step tasks and you realize that you're doing that task kind of on the regular. So every time you land a new client, there's this sort of multi step bundle of tasks that you're doing, that would be something that would be good to turn into a process. It's also good anything that makes you kind of nervous to develop a step by step process for it. Whenever you find yourself thinking, Okay, where do I start, That's an indication that maybe you need a process for that, or at the end of something when you find yourself thinking, I missed that step. Again, that's an indication that maybe you need a process. So when you create a process. The first thing you want to do is just sit down and say okay when I do this thing when I'm, What, I'm just going to say when I'm in taking a client, what are the steps that I go through to intake a client. And what is the goal of each of those steps so I might have, you know, several sheets of paper and each one has a step and then it has some notes about the goal for that stuff. And then I'm going to pause and think okay what are the things that I might be missing or that are easy to miss. You're not going to catch all of them maybe right away but it's good to start thinking in that line. And then from all of that from the lists from the goals from the notes about what's easy to

miss, you're going to create a bullet point list or bullet point process from that list of those notes. So now you'll have a sheet of paper that's just got you do this, you do this you do this and then you do this and that's the process. And then occasionally, you're going to want to refine the process. I like to review the process that each time I use it so if I pull out my client intake process before getting on a client call after I go through that client call I'm going to come back to that intake process and I'm going to say, Okay, how did this go. Was there something that missing, what was missing, or was there something that came up this time that hasn't come up before. Are there things that I could do differently, that would improve this process, and then based on all of that I will update my bulleted list of steps for that process. Alright, so that in a nutshell, is why processes are valuable how they can help you in your business. Some processes that you can start using right away, and how you can make those processes for yourself, going forward, I hope that you all found that useful and that you're kind of excited to start documenting and codifying the things that you do in your business that sounds kind of like geeky I guess but it is a really useful thing to get in the habit of doing because like I said, it boosts your confidence makes you feel prepared cuts down on the time that it takes you to do things that you do, repeatedly, and just helps you get more professional and better over time. Alright. So Sue asks, Can you give some examples of goals. And I think what Sue means is goals. I'm going to kind of click back here on my slide. So goals that we might have on our calls. And if I'm wrong Sue just pop in there and say that's not what I meant. So we're going to establish the goal for the call. Yeah, the goal for the client intake process okay good, I'm on the same. I'm on the same page. So there are a couple of different ways to think about goals in the client intake process, what is your goal for the call. And so when you establish the goal for the call. This is kind of the opening conversation that you have with the client and this goal is going to be the same from call to call. The goal is to ask them questions to listen intently, and then based on the answers that they provide identify how you might help them fix the problem that they're having. So that's your goal for the call and you're going to establish that goal with the client, so you're going to, you're going to get them to get by, or you're going to ask them to buy into that goal to agree to that goal. Before you start asking those questions. So that is a similar goal, but you are also going to find that they are going to have different pain points so we've got our goal for the call. But then your client is maybe going to have different goals in mind. So, these broadly sort into four different categories, your client is going to be struggling with brand awareness, so they're not going to be getting enough traffic. They're not going to be getting enough followers on social

media, they're just not going to be getting noticed. And so if brand awareness is really kind of their pain point. The goal might be to implement a content marketing strategy to implement or to implement a social media strategy. Those are going to be the two most common goals, to answer that brand awareness question for us as writers. The next goal that your client might be the next pain point they might have is yeah, they're getting a bunch of traffic, but nothing is happening with that traffic nobody is actually signing up for their list, or nobody is buying anything. So the first one is leads, they want more leads, they're getting the traffic, and they just, they want people to say yes i'd like to engage with you some more. So in that case, you're going to be looking at their signup process, do they have a subscription email that people can sign up for and what does that process look like and how can you improve that process. So that's one common thing to do for Leads. Leads can also be something that you focus on over in social media asking people to sign up for free webinars, all sorts of different ways that we can help our client to do better with leads. Another goal that your client is commonly going to have is okay yep we're getting leads, but nobody's buying anything. So then you're gonna look at their sales process, you're gonna look at their sales pages their landing pages their funnels, their product pages all that stuff that they have out there that's meant to help their prospect to buy, and you're gonna feel like, figure out what's maybe falling short, or what is missing, and then you're going to help them on that front. And then the fourth goal that your client may have is, yes, we are making sales, but we're not making repeat sales and we're also getting a lot of returns. We're also getting bad reviews, like people say mean things about us on social media, makes us sad. And so in that case that actually circles all the way back around to content, you are going to be. Well, content is one option so you're gonna be looking at the things that the supportive content that they have for existing clients, you're also going to be looking at, what kind of content they send out through email to their existing clients, and you're going to look at their fulfillment process to make sure that it is really easy to use and makes a lot of sense. So those are kind of the four broad umbrellas that you'll find cover the different pain points that your clients will come to you saying please help me with this pain point. Hopefully that was helpful. Great questions so I do appreciate those, anybody else have any questions for me. All right. I don't see anything coming in yet but if you guys are thinking back on this and you realize hey I don't think that Heather really covered this the way that I needed her to feel free to post that question on the event page on wealthy web writer, and I will make sure that I get your question answered for you. Um, I do have a question coming in. So there's a goal for the call, which includes

understanding your clients goals. Exactly. How about the end of the whole client intake process. So at that point, you understand your client's goals and you understand how you can help them, and then you're going to put that into a proposal, and I'm going to be talking in depth about proposals and our meeting on Thursday, which is at 4pm, Eastern Time. That will also be recorded so if you can't make it live to that to see all the ins and outs of putting together a strong proposal that recording will be available. But yeah, the goal at the end of the call is to identify, can I help the client, fix their pain point. And if I can. You're going to put that together into a proposal for them and hopefully move that into a paying project. So again, great question, Sue, I really do appreciate those and I hope you will join us on Thursday when we get more deep into that proposal process. Alright everybody, thank you so much for joining me today. I hope you all have a great week. I hope I see you all on Thursday, and thanks for your attention today. Have a good one. Bye now.

Thank you so much, Heather,

have a great day. Thank you for on YouTube. Bye. Bye.