



The Power of Process



What You'll Learn

- Processes vs. systems
- How processes help leverage your time
- 5 processes you can start using today
- Building your own processes



Systems vs. Processes

Systems

- Are complex
- Are supported by processes
- Tackle “strategy” problems
- Perpetuate
- Strive to fulfill long-term goals

Processes

- Fulfill a singular purpose
- Link together to create systems
- Tackle “tactical” problems
- Have a clear beginning and end
- Provide clear tasks and next steps



Leveraging Your Time

Scenario A

- Discovery call request
- 18 hours to prepare
- What do you do?
- What do you ask?
- What is your goal?

- Time Needed - Unknown



Scenario B

- Discovery call request
- 18 hours to prepare
- 5-part research process
- Pre-established questions
- Known goal

- Time Needed: 1 to 2 hours



Processes...

- Give you time
- Start you from a place of preparedness
- Provide confidence
- Put you at ease
- Codify the next step





5 Processes You Can Use Now

Client Intake Process

- When: Discovery Calls
- Before the call...
- During the call...
- After the call...



Client Intake Process – Before the Call

- Visit the client's website
- Find good things and gaps
- Read key pages
- Sign up if that's an option
- Visit three competitors
- Read industry news



Client Intake Process – During the Call

- Establish the goal
- Ask key questions
- Find their pain point
- Listen to understand
- Determine if you can help
- Outline next steps



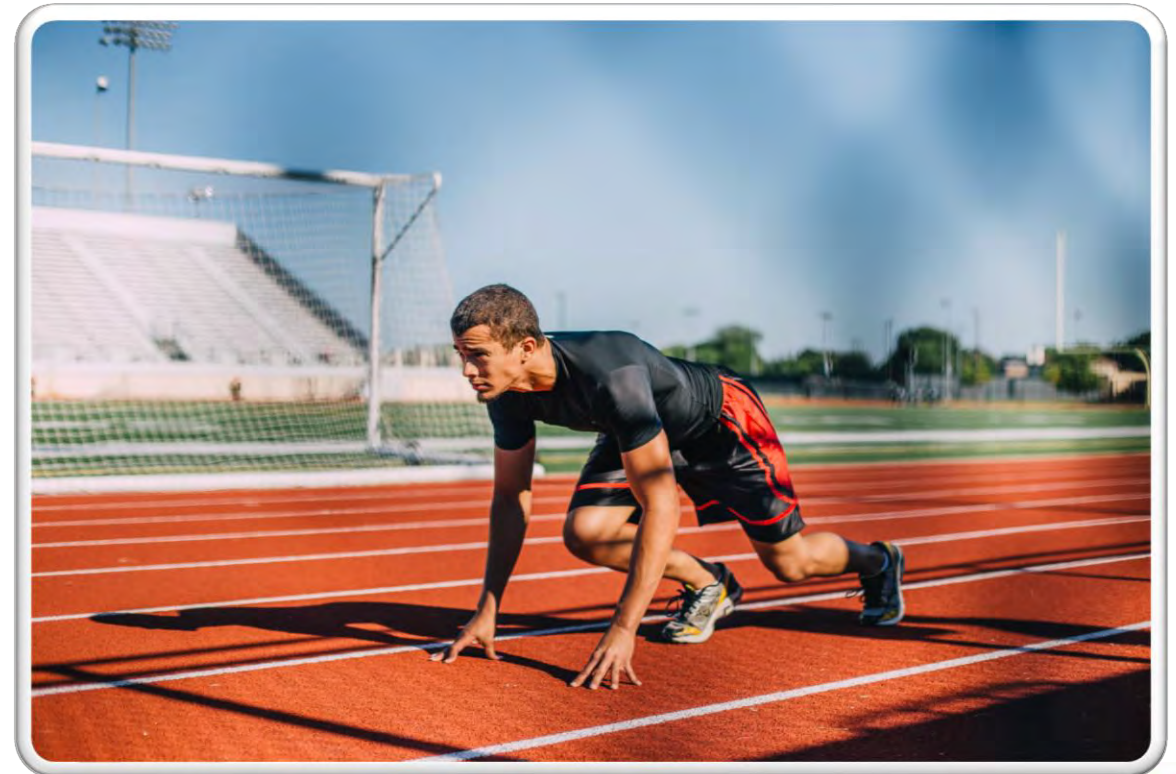
Client Intake Process – After the Call

- Summarize key points
- Create a plan
- Put together a proposal
- Send it
- Follow up



Project Kick-Off Process

- Review project type
- Gather materials
- Review attachments immediately
- Questions?
- Set project milestones



Research Process

- Read broadly
- Fast write
- Outline and gaps
- Gather more proof
- Find holes
- Get granular
- Consider unique research



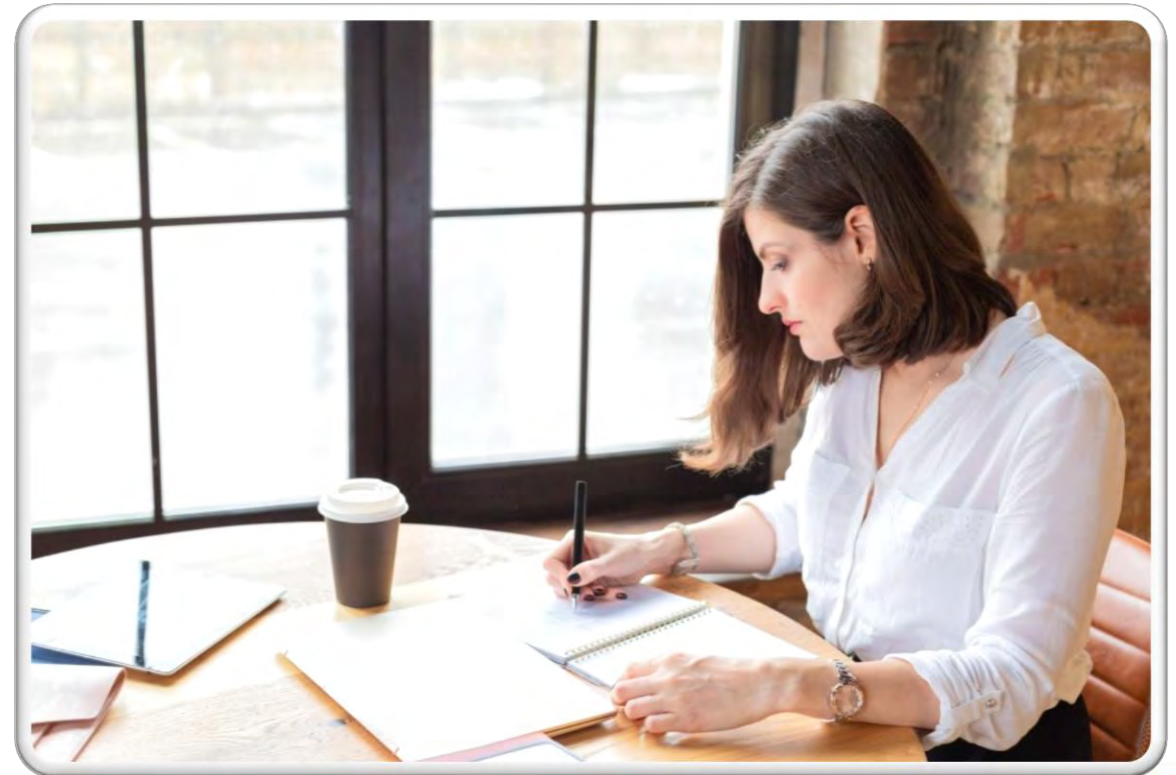
Revision Process

- When: Draft is complete
- Revision
- Editing
- Proofing



Revision Process - Revisions

- How can I punch this up?
- How can I set this apart?
- What is missing?
- Is the order logical?
- How can this be more engaging?
- *CUBA*



Revision Process - Editing

- Sections and paragraphs
- Formatting
- Clarity
- Concision
- Voice and tone
- Ease of reading



Revision Process - Proofing

- Typos and mistakes
- Missing words
- *Your* common errors
- Proof it backwards



Project Wrap Up Process

- Final approval
- Invoicing
- Internal debrief
- Performance check
- Testimonials, referrals, new work

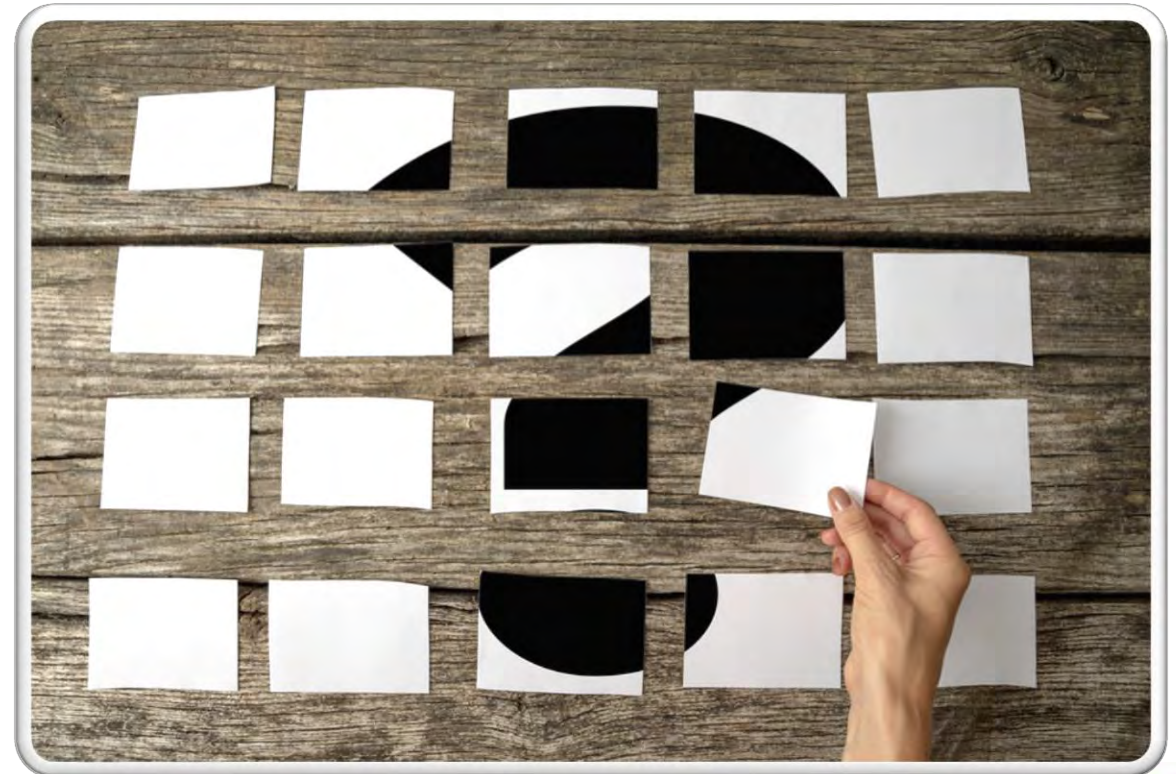




When and How to Make Your Own Processes

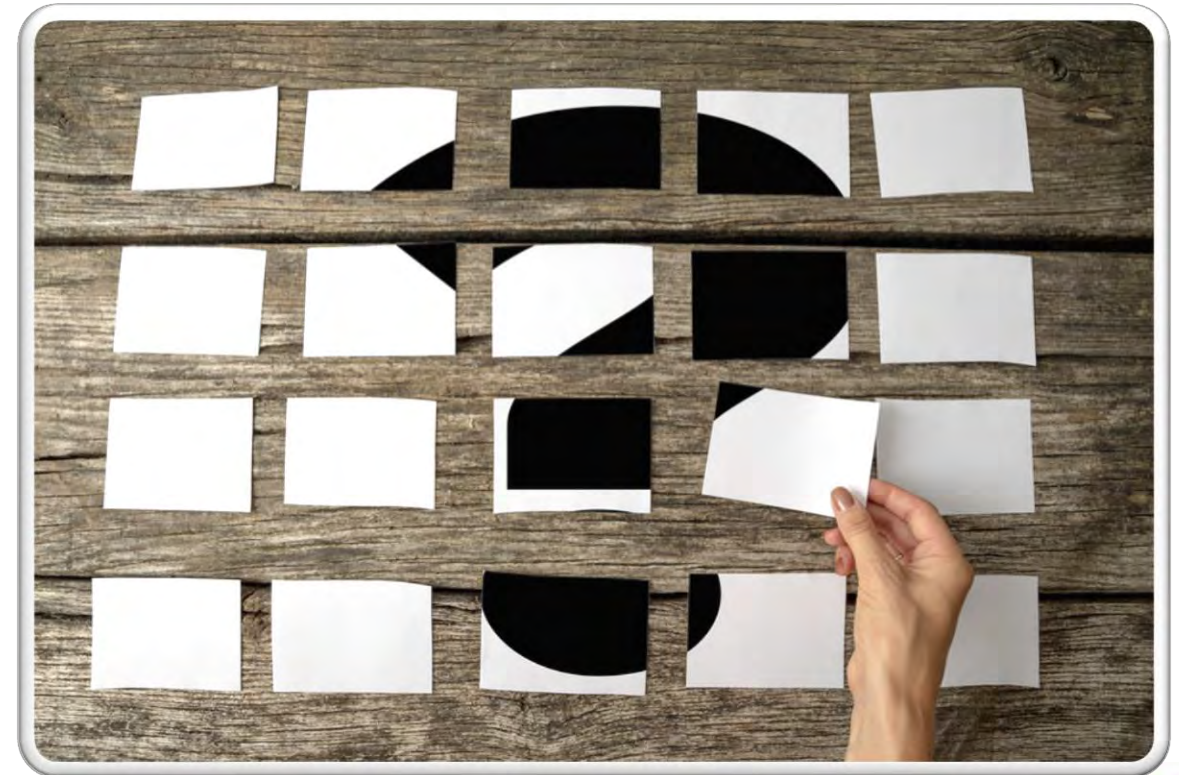
When You Need a Process

- Multi-step tasks
- Common tasks
- Things that make your nervous
- “Where do I start?”
- “I missed a step... again.”



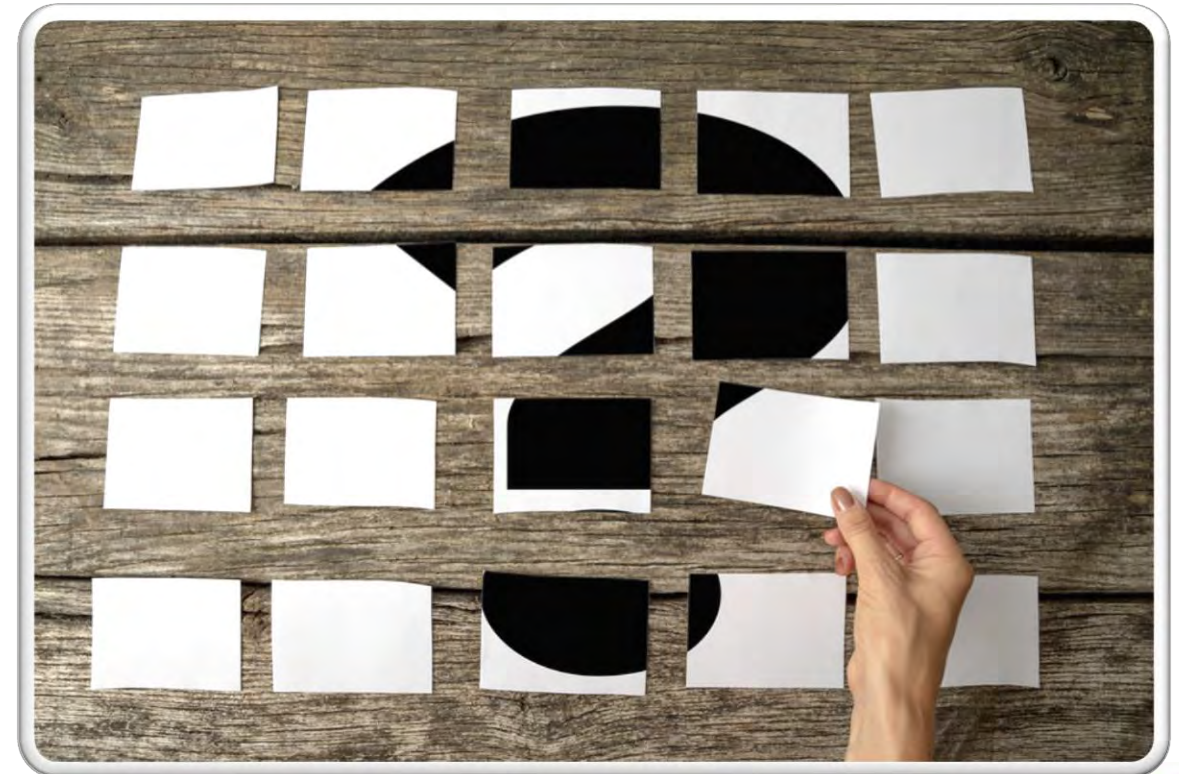
How to Create a Process

- List the steps
- Think through the goal of each step
- What's easy to miss
- Create a bullet point process from your list and notes



How to Refine a Process

- Review each time
- What was missing?
- What was new?
- What could improve?
- Update your bulleted list of steps.





Thank you!