

SYSTEMS TO CREATE IN A WEEKEND

to streamline your business

THANK YOU!

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Efficient
Business
STRATEGIES

BRITTANY KLEMENTS

Efficiency Strategist

Efficient
Business
STRATEGIES

To Do Lists
Automation
Weekly Planning Time
Prioritizing a Long List
Goals and Projects
Documentation for Training
Client On-boarding

Software Recommendations

TO DO LIST

How to set up a better system

CAPTURE &
COMBINE

FIND A
CAPTURING
SYSTEM

COMMIT TO
YOUR
SYSTEM

Getting Things Done by David Allen

Capture & Combine

Make 3 "piles"

- Physical Spaces
- Computer Files
- Email

Find a Capturing System

Commit to Your System

Shake Weight

TO DO LIST

AUTOMATION

The two types I teach and implement

SOFTWARE
AUTOMATION

SCHEDULE
AUTOMATION

Software Automation

Email Automation

Scheduling Automation

Zapier

Capterra

Scheduling Automation

Block out your calendar

Recurring meetings

Weekly Planning

8 AM		8 AM WORK TIME				8 AM WORK TIME	
9 AM			8:30 AM Recurring Client	8:30 AM Recurring Client	8:30 AM BNI Downtown Vineyard Church		
10 AM			9:30 AM OPEN FOR MEETI...	9:30 AM WORK TIME			
11 AM			10:30 AM OPEN FOR MEETI...		10:30 AM OPEN FOR MEETI...		
Noon		11:45 AM Feed Pryce	11:45 AM Feed Pryce	11:45 AM Feed Pryce	11:45 AM Feed Pryce	11:45 AM Feed Pryce	
1 PM		1 PM OPEN FOR MEETI...	1 PM WORK TIME	1 PM OPEN FOR MEETI...	1 PM WORK TIME	1 PM WORK TIME	
2 PM		2 PM OPEN FOR MEETI...		2 PM OPEN FOR MEETI...			
3 PM		3 PM OPEN FOR MEETI...	Recurring Client				
4 PM		4 PM OPEN FOR MEETI...	3:30 PM WORK TIME	3:30 PM Recurring Meeting	3:30 PM Recurring Meeting		
5 PM							

WEEKLY PLANNING TIME

The MVP of my consulting process

CREATING YOUR
PLANNING TIME

What things tend to happen last minute in your business?

What things happen frequently?

What things happen regularly?

What is causing you stress?

What task do you move from day to day or week to week
on your to do list?

Sending Thank You cards

Bookkeeping

Saving receipts

Tracking Mileage (MileIQ)

Plan marketing

Blog posts/newsletters

Client outreach

Inventory

Project planning

Order office supplies

Backup computer

Personal development

Update CRM

Import business cards (CamCard)

Block time on calendar

Get gas

Staff meeting

New ideas

PRIORITIZING A LONG LIST

How to get started when you're overwhelmed

"MOST OF US SPEND TOO MUCH TIME ON
WHAT IS URGENT AND NOT ENOUGH TIME ON
WHAT IS IMPORTANT."

- STEPHEN R. COVEY

What is your capacity right now?

High or low energy / Capacity for thinking or checklist oriented

How much time do you have available?

Are there any fires to put out?

Will this move your business forward? Is it a necessary fire?

Pick 3 things

Is someone relying on you?

What will make you money today?

What is the next step that will move your project forward?

OUTLINING PROJECTS AND GOALS

By keeping your bigger purpose in mind

IDENTIFY
YOUR GOALS

WORK
BACKWARDS

DAILY
ACTIVITIES

Where do you want your business to be in 6 months?

1 year

5 years

What about your exit strategy?

What is something you want to accomplish in your business?

What is your biggest, scariest, most ambitious business dream?

Two versions of working backwards

Recurring Actions

Special certification

Step by Step actions

Hire an employee in 6 months

Questions to Consider

What could you do TODAY (and every day) to move a step closer to your goal?

Are you doing something every day to move closer to your goals?

How often do you review your goals?

DOCUMENTATION

for training

DOCUMENT

DELEGATE

DUPLICATE

Document

SOP Demonstration

Resources: templates, software, professional resources

Delegate

Duplicate

DOCUMENT, DELEGATE, DUPLICATE

CLIENT ONBOARDING

How many step does it take for a client or customer to spend money with you?

Identify where you are

Document your current process - count the steps

Reduce the number of steps

Make it easier for your clients

Automate, document and simplify

Efficient *Business* STRATEGIES



THANK YOU

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THANK YOU FOR
COMING!



FEEDBACK

THANK YOU!