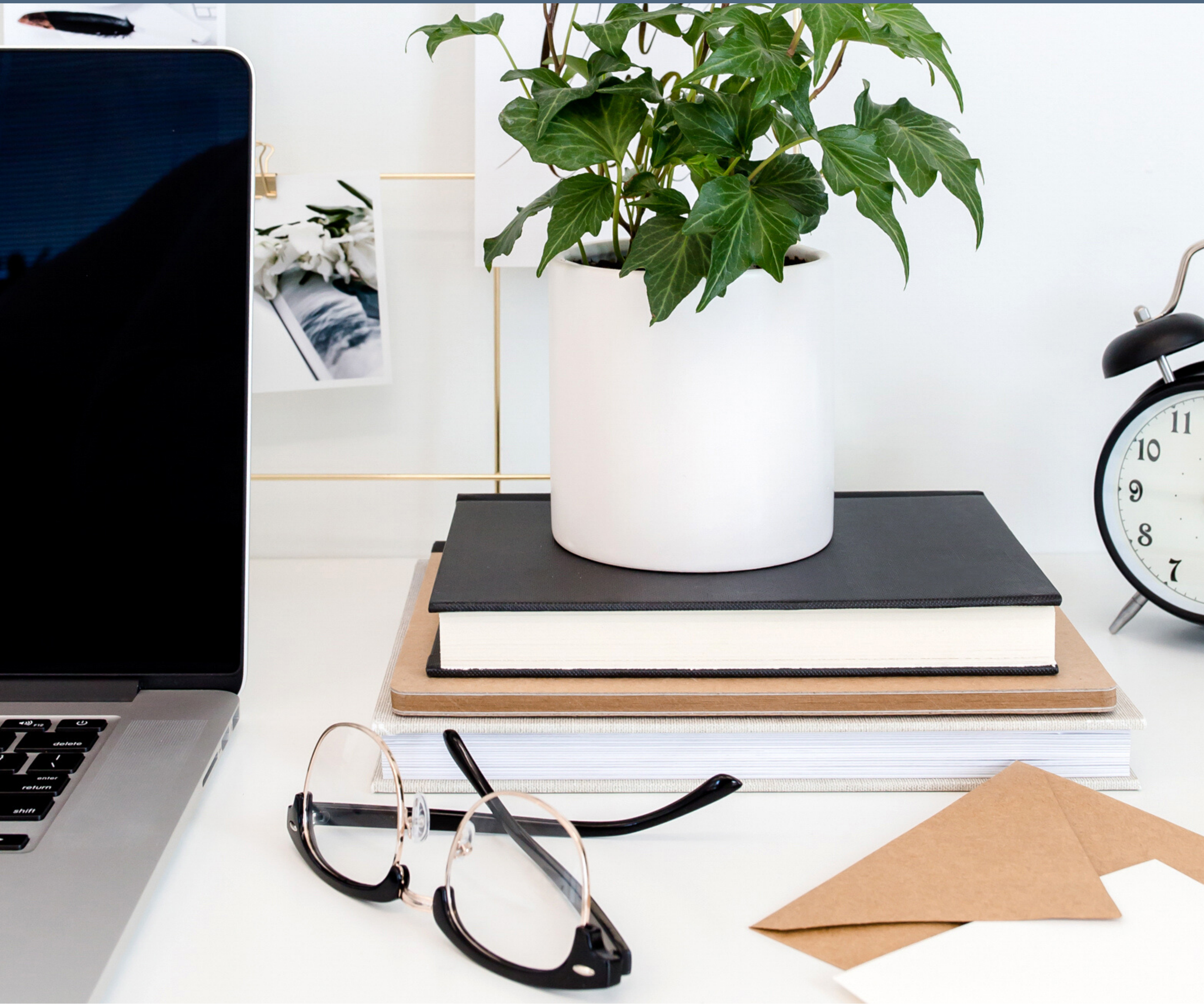
WORKFLOWS, SYSTEMS, AUTOMATION AND FINDING WORK-LIFE BALANCE

L A U R A L E E



WELCOME, FRIEND!

I created this workbook to give you a comprehensive place for you to get more familiar with the workflows, systems, and templates you need to grow your business, without burning out.

Far too often (like literally ALL THE TIME) I see business owners struggling to run their business, get a normal amount of sleep, get organized, and streamline their processes and systems because they just think business has to be hard. I'm not sure if it's because people like to glorify busy in this day and age, or if they just simply don't realize there is a better, easier, **way faster** way to do nearly everything they're trying to do in their business.

I think most people think: It's supposed to be filled with sleepless nights and stress and constant overwhelm, right? Isn't that what we signed up for?

Let me shout this out: **HECK NO WE DIDN'T!**

We became our own boss because we wanted FREEDOM! Freedom to make our own schedules, to not have a cap on our income, to do work that lights us up, to serve clients who make our hearts pitter patter, and to have time to spend with the people we love the most. **We did NOT become our own boss to trade our 9-5 jobs for a 24/7 one, spend our days doing admin tasks that we think will take 5 minutes and magically take 13 hours, or feeling guilty when we take a gosh darn day off.**

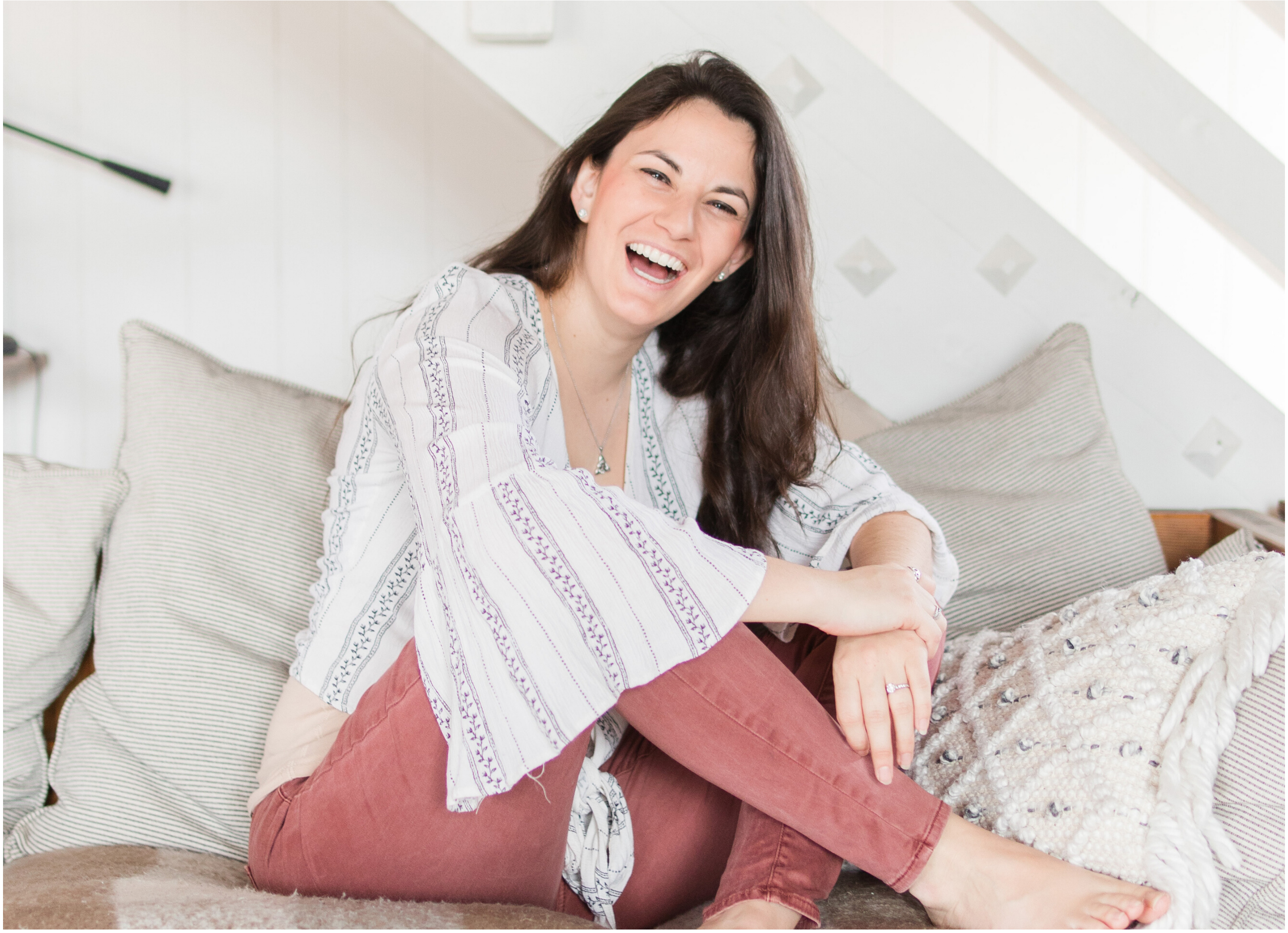
So, then **WHY THE HECK DOES THIS HAPPEN?**

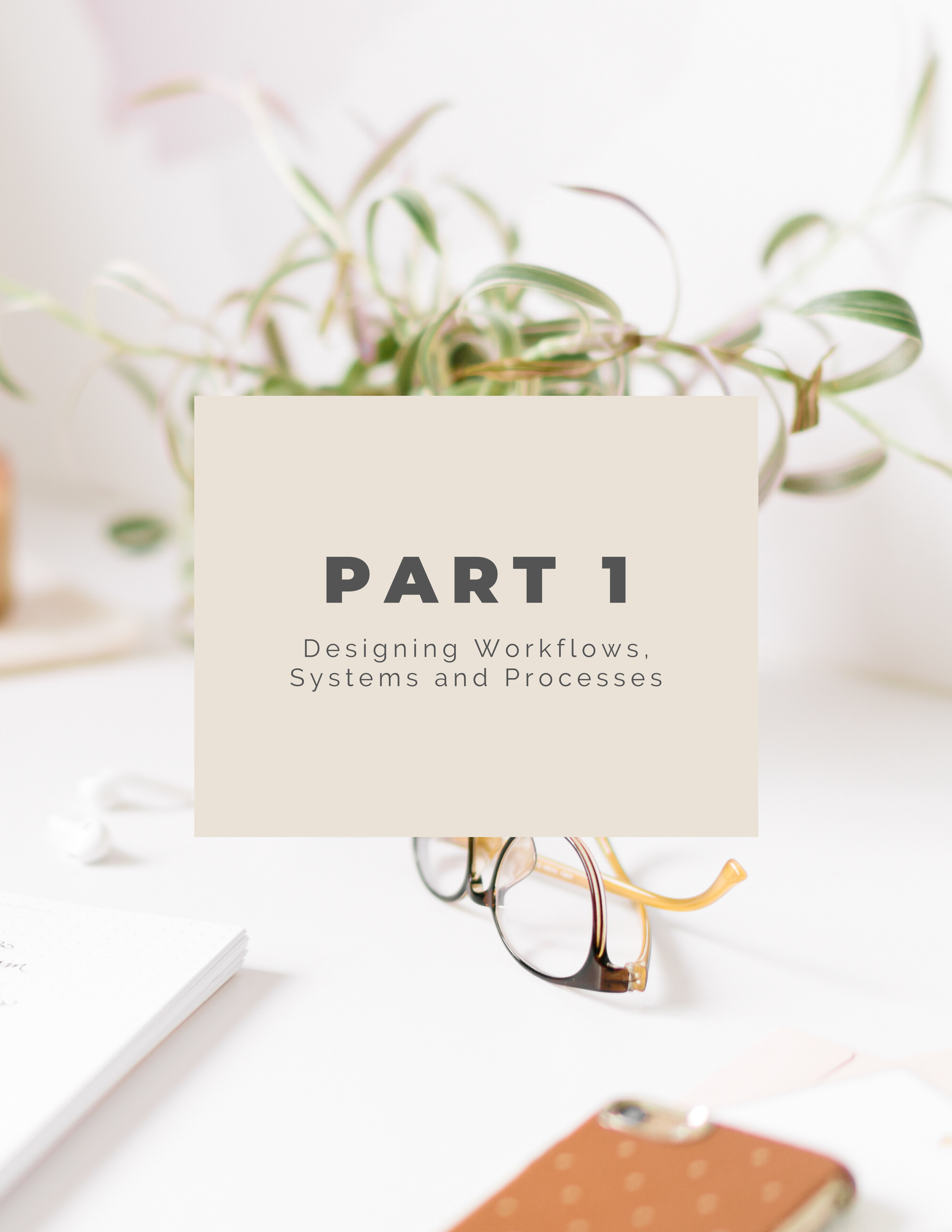
Because so many business owners run their business like a leaky bucket with duct tape covering the holes. They mask the problems in their business without figuring out how to fix it for good. Most business owners are losing clients, opportunities, money, time, and sanity because of their leaky buckets, and this workbook is the guide you've been missing to figure out how to plug those holes for GOOD.

So, let's get started!!!!

Oh, and PS. Hey, hi hello! I'm Laura - founder of Laura Lee Photography, Laura Lee Creative and Find Your Freedom. Yup - #multipassionate entrepreneur over here. I've been in business for 8 years+ as a wedding and brand photographer, and a business coach, and I get FIRED UP about helping business owners like YOU get their lives back. I'm obsessed with mountains, firepits, deep conversation, and a good glass of Riesling, and if you combined all of the above into one setting, I'd probably end up learning your whole life story and all your deepest dreams and desires for your life.

I care about your business because I care about your life. They go hand in hand and that's at the center of what I do: help business owners on their pursuit of freedom. Of less work, more life, more passion, and more doing what lights us up!! I cannot wait to hear how this workbooks helps transform your business!!





PART 1

Designing Workflows, Systems and Processes

12 Things Every Workflow Includes:

1. Chapter Headings/Stages of Your Project
2. Tasks (within each stage)
3. Subtasks (within certain tasks
4.)Due Dates (based on previous step or project date)
5. Assignees (if you are delegating)
6. Client Education (throughout each stage)
7. Email Communication (throughout each stage)
8. Questionnaires
9. Pricing Guides / Brochures / Quotes
10. Client Guides
11. Client Gifts
12. Client Meetings During the Process

Seven Steps for Creating and Implementing Workflows:

1. Write Out Your Sections or Stages

The first step of creating your workflow is writing out each section of your workflow. Sections are not tasks, they're where your tasks, subtasks, emails etc. all exist throughout the different stages of your workflow. Examples of sections would be "The Inquiry Process", "Client Onboarding" or "Post Production for Wedding"

2. Fill in the Sections or Stages (With tasks, subtasks, emails, etc.)

Each Stage or Section would have multiple tasks and subtasks, emails, questionnaires, etc. Each of the 12 pieces of a workflow we went over above would be filled into each section. ***Not every section will have all 12 things though of course!***

3. Assign Due Dates

Once you have your workflow written out, you can go through and determine when each task, subtasks, email, questionnaire etc. needs to be completed! Your due dates can be based of three major things:

1. When a previous task is complete
2. When the workflow is activated
3. Before or After the Project Date

4. Determine who does what

Once you have a workflow in place, it becomes much easier to go through each step and see what you can outsource or delegate to someone on your team, or a subcontractor. When I first created my workflow, I color coded who I was going to outsource certain tasks to and when this happens in the process.

Ask yourself: On a scale of 1-5 how much do I love or hate this task? Is this task in my zone of genius, zone of competence or zone of incompetence? If it's not in the top 2, let's get rid of it. And if it's in your zone of competence, let's work towards outsourcing it as we grow our businesses.

Let's figure it out:

1. What tasks do you know you're not good at, that you procrastinate on, that you could hire out for? (Aka your Zone of Incompetence) (Examples: Bookkeeping, Accounting, Taxes, Album Design, Copywriting, Graphic Design, etc.)

2. What tasks are you pretty good at, but you don't NEED to be doing yourself because they don't directly result in income? In an ideal financial situation, these will be outsourced. Usually, these are the things taking up a HUGE portion of your time, without having a financial return. (Admin tasks, Website Design, SEO, Editing, Album Design, Blogging, etc.)

3. What tasks are in your zone of genius that directly result in clients or income that you cannot or will not outsource?

5. Determine Where Tasks & Subtasks Can Be Made More Efficient

Now that you have the checklist foundation of your workflow, you can go through it to see where every task or subtasks can be made more efficient and streamlined. Here are some questions and tips to get you started on streamlining your workflow.

Let's figure it out:

1.What email templates do you need to create to serve your clients better, and make things easier for you?

2.What role would you want to hire out for on your team? Either as a part time person or a subcontractor? What tasks do you want to outsource?

3.What templates can you create other than emails to make your work go faster? (Blogging template, newsletter template, editing preset, etc.)

4.What softwares, or apps are you going to look into to make your life easier?

6.Determine Where You Can Add Value to Client Experience Throughout Each Stage

Gleaning what you know about marketing, where can you add client touch points in each section of your process to bring more value, better their experience, make a personal connection?

Let's figure it out:

1.Where can I add even better client touch points throughout each stage?

2. Where can I add good marketing with my clients?

3. Where can I surprise and delight my clients throughout the process of working together? How can I WOW them?

4. What questions can I answer proactively that will make their experience better?

5. What parts of the process do I have little communication with them that I can reach out and stay top of mind?

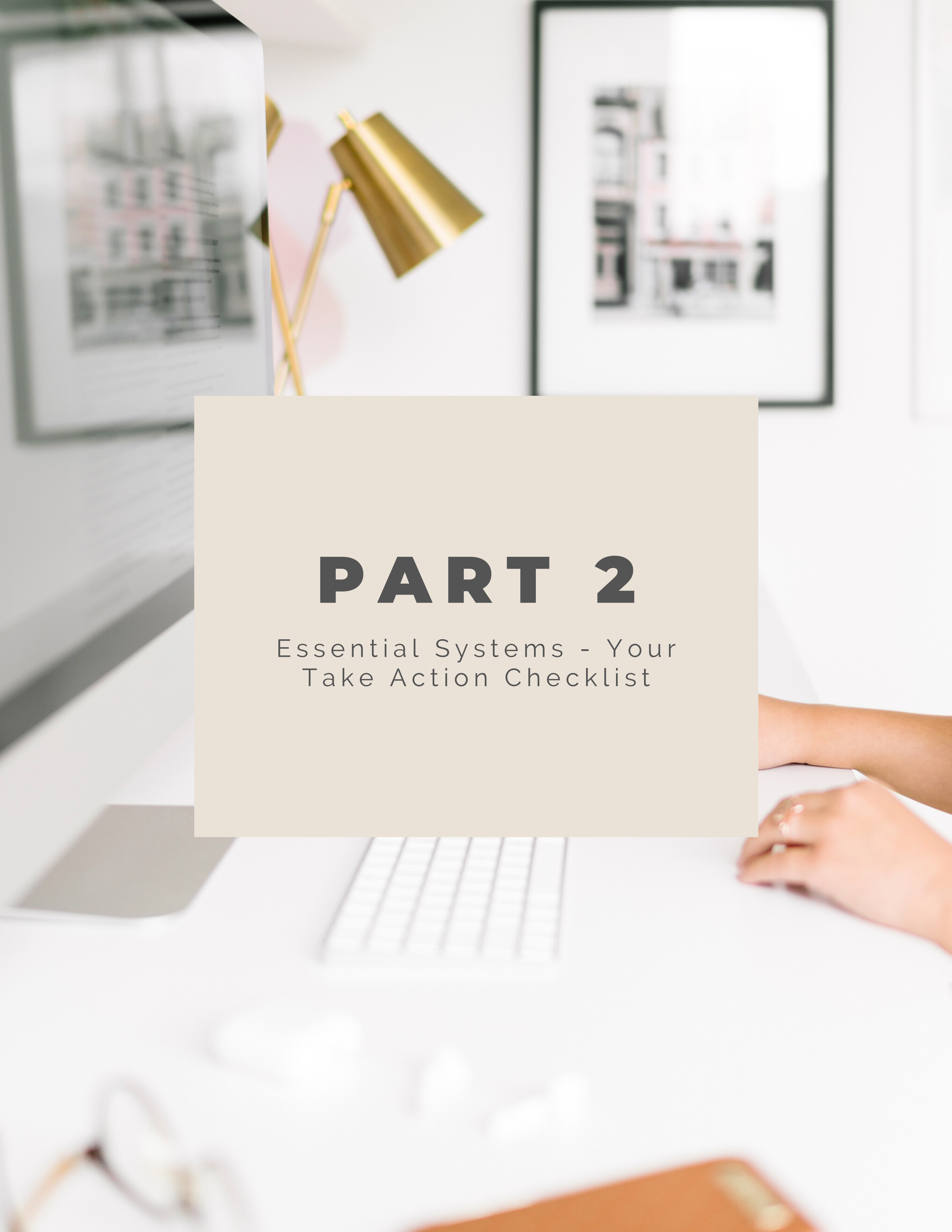
7. Automate + Input Workflow into CRM or Task Management System

Once you have your workflow designed (I suggest started in a google doc so you can fiddle with it and edit it a bunch until you're satisfied with it) then you can put it into a CRM such as HoneyBook, or a task management system such as Asana or Trello or Clickup (My preference is Clickup).

This allows you to Manage Multiple Clients and Projects Efficiently
I personally use HoneyBook, and since I have my workflows, email templates, questionnaires, and brochures all hosted on the platform, all I need to do is apply the proper workflow to each client, and it will give me a list of tasks for every day. This allows me to manage an average of 72 active projects at a time with ease without ever wondering what clients have tasks outstanding or falling through the cracks.

Click Here to Start a FREE trial of Honeybook

USE THIS SPREADSHEET TO CREATE YOUR WORKFLOW

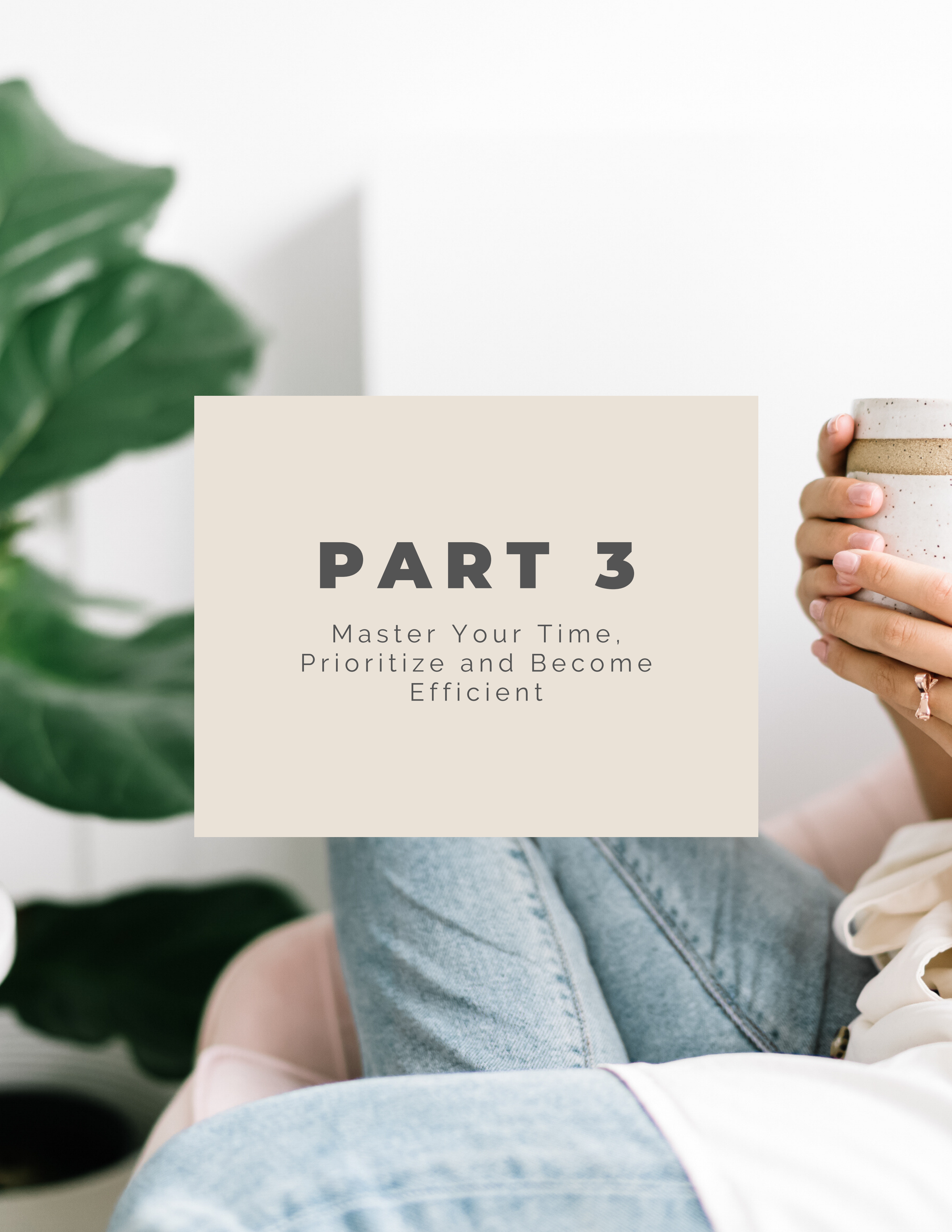


PART 2

Essential Systems - Your Take Action Checklist

Your Take Action Checklist for Setting Up Systems

- Sign up for A CRM such as HoneyBook
    - Set up your packages
    - Set up your brochure
    - Input your email templates
    - Input your questionnaire templates
    - Input your workflows
    - Create your contact form
    - Input all your current client projects
    - Apply your workflows to all clients
    - Check off all tasks up to the point you're at with current clients
    - Check in the task manager daily to see what you need to do each day!
- Sign up for a project or task manager such as ClickUp
    - Set up your teams
    - Set up your folders
    - Set up your projects within each folder
    - Do your initial braindump
    - Prioritize all projects and tasks inside Clickup
    - Set due datesAdd any team members into the platform
    - Download the chrome extension



PART 3

Master Your Time, Prioritize and Become Efficient

Tips for Managing Your Time, Tasks and Priorities

Pro Tip #1: Protect Your Time

- Don’t check your email first thing in the morning
- Cut out distractions
  - Turn notifications off
  - Phone on do not disturb mode
  - Use the focus keeper app and take breaks to check distracting notifications during your break time
- Track your time and find your bottlenecks
  - Use the prompts below to determine where your current time is going
  - The more time you can spend focusing on the things that help really move the needle on your income, the better.

Pro Tip #2: Set Deadlines and Time Limits on Your Tasks

- Download an app such as focus keeper, Focus, Flora, Multi-Timer, or similar to start timing your tasks.
- Create a to-do list by the hour or minute - allotting the exact amount of time it is going to take you to complete a task

Pro Tip #3: Track Your Time + Determine Where All Your Current Time is Going

1.Where are your bottlenecks?

2. Where are you completely just wasting time?

3. What are you most productive times of day?

4. Least productive times of day?

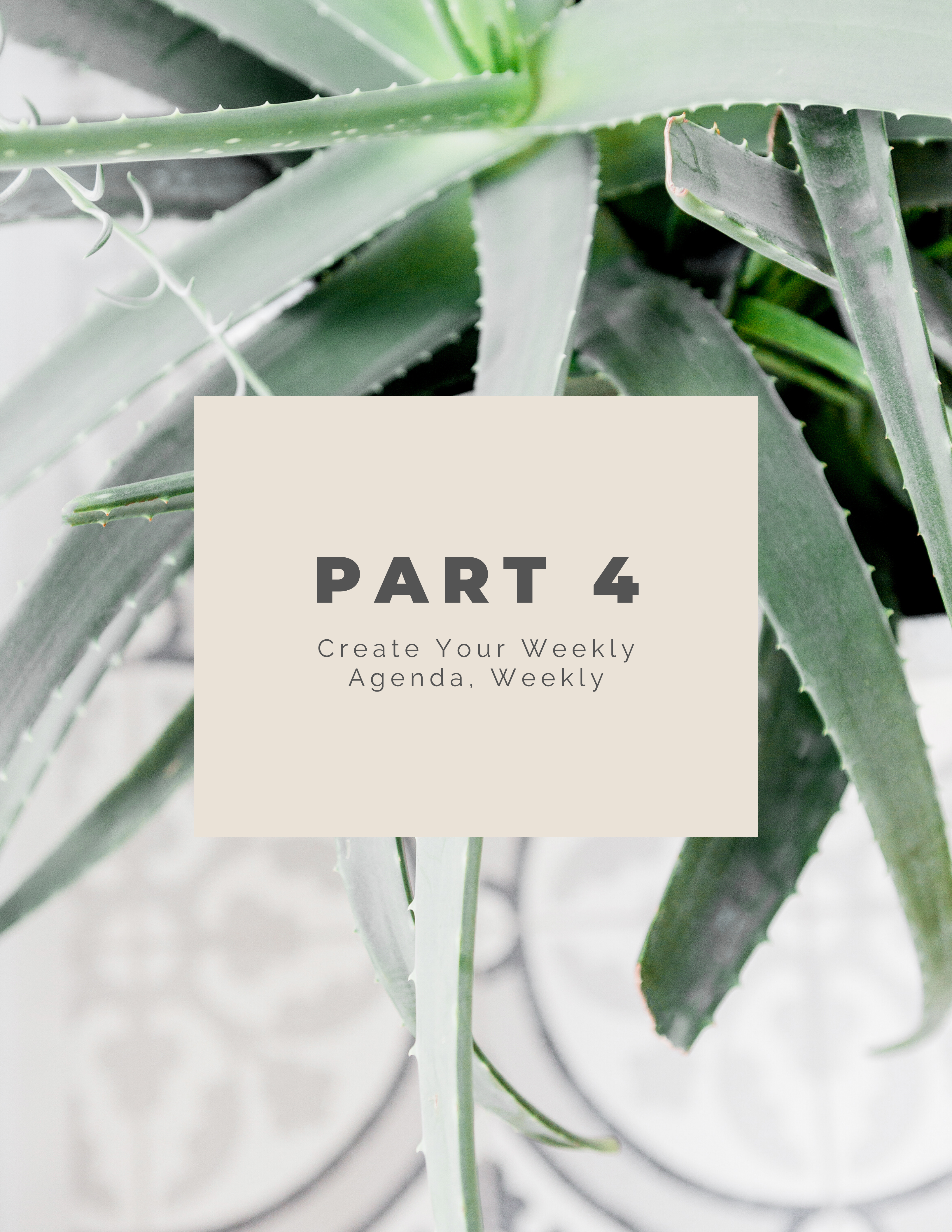
5. What tasks did you feel like you really got in the zone with?

6. What tasks did you avoid and procrastinate on?

***Action: Print out a time tracking sheet and track your time for 2 weeks**

Pro Tip #4: Batch Your Tasks or Days

- Batch Task Ideas:
  - Scheduling your social media for a week or two at a time
  - Creating a content calendar monthly so you don't have to be in brainstorm mode all the time
  - Designing canva graphics for upcoming newsletters or blog posts (once your content calendar is made!)
  - Meetings! I like to personally schedule all my meetings in two days so my other days can be dedicated to getting work done.
  - Writing newsletters or blog posts
  - Email Clean up for the promos tab
  - Bookkeeping
  - Taking flat-lay photos for your blog or instagram
- Batch day ideas
  - Personal growth
  - Marketing
  - Client work
  - Product
  - Meetings
  - Finances and admin
  - Rest
  - Content day
  - Coaching call day
  - Team day
  - Admin day
  - Networking day
  - Brainstorm day



PART 4

Create Your Weekly
Agenda, Weekly

This is my step-by-step system for planning out my weeks

- Step 1: Do a weekly braindump - I like to start off by writing out all the outstanding PROJECTS are that need my attention that week. Then I go into the TASKS. Include everything in your head. Any client random things that aren't in your workflow, any business things, any emails you need to send, people you need to follow up with, personal things you need to do, projects you need to push forward, future project ideas, everything.

- Step 2: Add everything into your project management software. I like putting it right into my "BRAINDUMP TO SORT" Project inside ClickUp

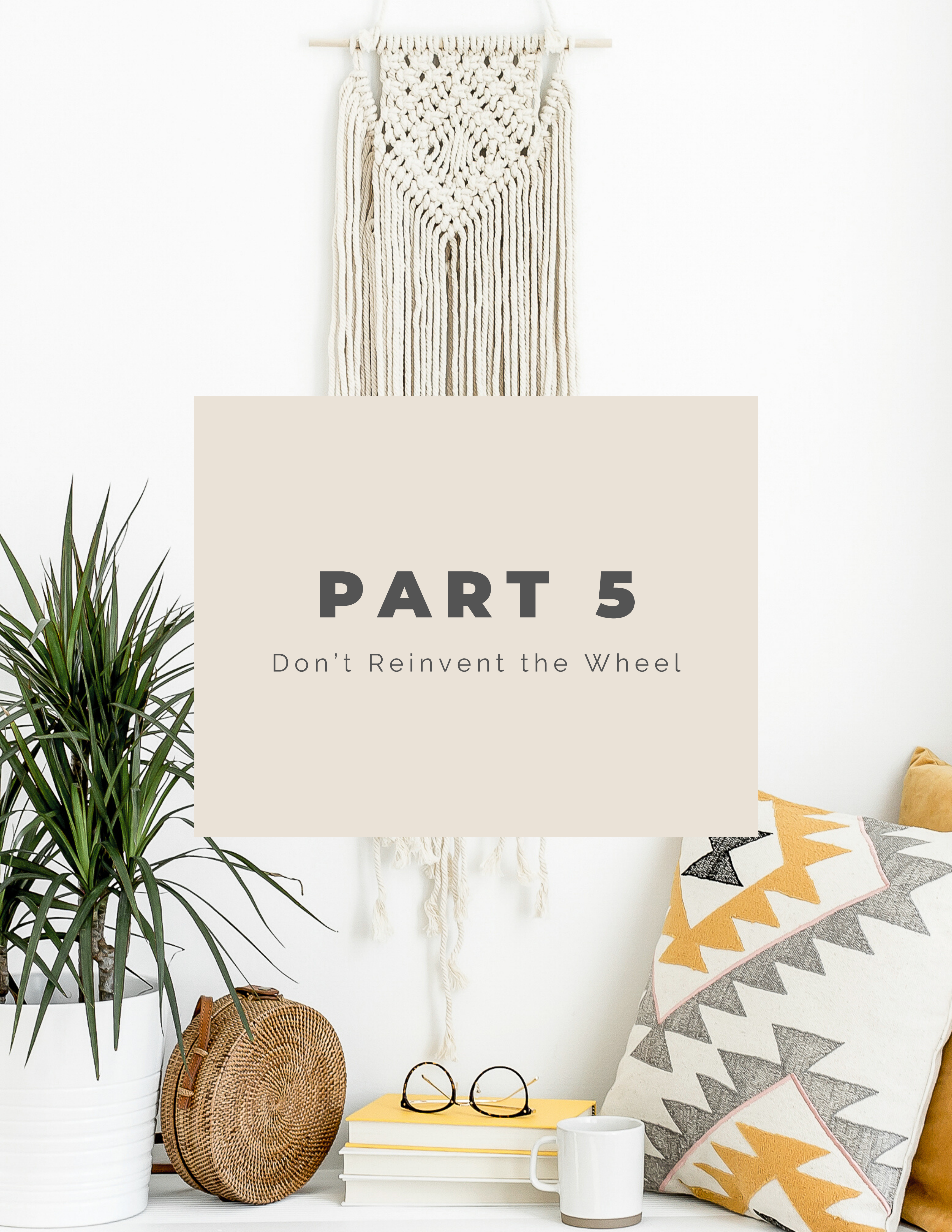
- Step 3: Choose the priority on all your tasks. If using ClickUp, I sort by:
  - Urgent: Anything that needs to get done this week
  - High: Anything I need to do 2-3 weeks out
  - Normal: Anything 3-5 weeks out
  - Low: Anything 5-8 weeks out
  - None: (Add to FUTURE PROJECTS LIST)

- Step 4: Add in any pre-existing meetings or activities to your calendar before assigning tasks.

- Step 5: Schedule all your urgent tasks out to a given day and time on your calendar. If using Clickup, do this in calendar view! You want to schedule things around your existing meetings. This is where I love figuring out the best way to batch my tasks and projects.
  - Prioritize your tasks and do the important work FIRST - schedule your big 3 for the day, each day.
  - Identify your most productive times of day and make sure this is when you're blocking off focused work time.

- Step 6: Schedule personal and fun things to look forward to and attend specific to that week!

- Step 7: Get to work!



PART 5

Don’t Reinvent the Wheel

Reinventing the wheel every time you get a new client is like rebuilding the engine every time you decide you want to use your car. It just doesn't make any sense... instead of creating extra work for yourself, stop reinventing the wheel and start using templates for everything you do in your business more than once.

Create templates for:

- Email templates in your CRM and Gmail
- Questionnaire templates in your CRM
- Video processes in Loom and Process St
- Process St Templates
- Workflows
- Master Video tutorials for clients
- Instagram captions
- Blog templates
- Newsletter templates
- Design files and graphics

Automate Tasks such as:

- In your CRM, you can automate:
  - Answering inquiries
  - Sending questionnaires and client education emails timed based on project date
  - Autoresponder in email
  - Invoicing and payment reminders
- In IFTTT / Zapier you can automate:
  - Connect apps
- In Calendly you can automate:
  - Appointment reminders
  - Scheduling
- In Qapital you can automate:
  - Automatic savings deposits based on rules you set up
- In Scheduling Social Media you can automate
  - Generating leads through FB Ads
  - Posts going live
- With Content you can automate
  - RSS Feed with Newsletter
- With Sales you can create:
  - Video based site client lounge

PHEW! That's a wrap!

Thank you so much for downloading this guide and helping me help you! It is my hope that it will transform your business into a streamlined, well-oiled machine. I hope to continue helping you along your journey and because of that, I wanted to share a few resources that will help you out!!

Click HERE to visit the Laura Lee Creative shop for all our workflow, email, questionnaire, and timeline templates for photographers. Use code LESSWORK for 15% off anything in the shop!

Click HERE to visit the Laura Lee Creative blog for dozens of great articles on saving time and streamlining the heck out of your business.

Click HERE to access a secret link to our top selling course: Photography Workflow Mastery

Follow along on Instagram

Inquire to work with me or our team for custom workflow creation and implementation