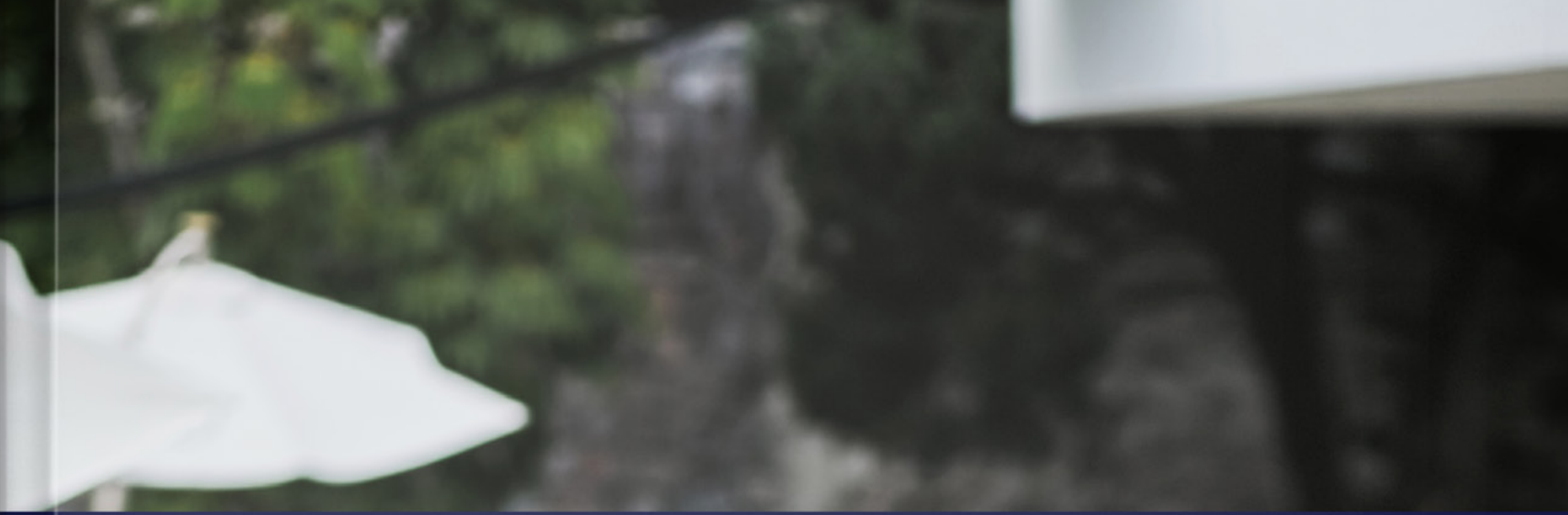
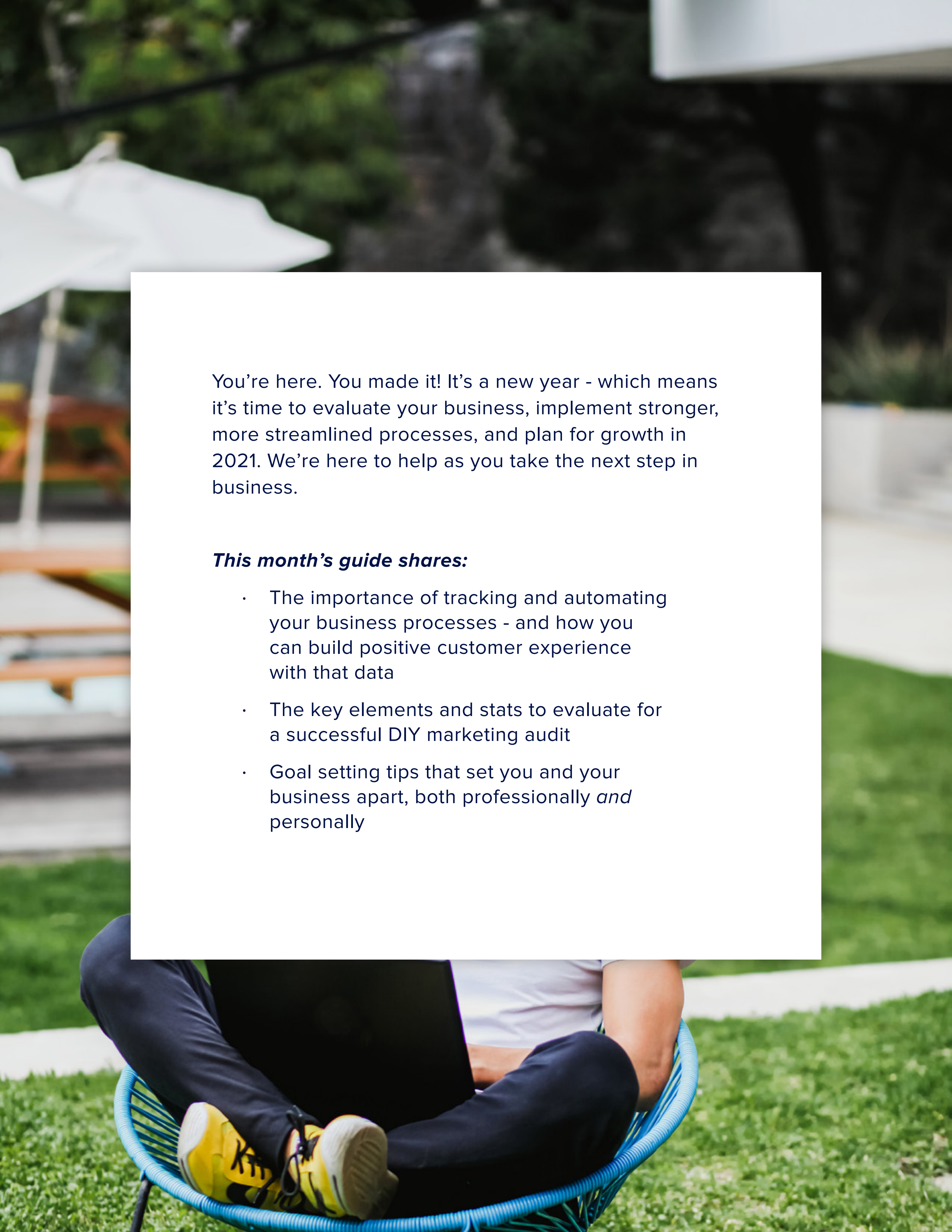


How to Optimize Your 2021

Business Process & Plan

HoneyBook | RISING TIDE



You're here. You made it! It's a new year - which means it's time to evaluate your business, implement stronger, more streamlined processes, and plan for growth in 2021. We're here to help as you take the next step in business.

This month's guide shares:

- The importance of tracking and automating your business processes - and how you can build positive customer experience with that data
- The key elements and stats to evaluate for a successful DIY marketing audit
- Goal setting tips that set you and your business apart, both professionally *and* personally

Table of Contents

KEY TIPS: HOW TO EVALUATE YOUR BUSINESS PROCESSES & PLAN FOR THE NEW YEAR

1

BEGIN WITH LAST YEAR - Every year brings new challenges and lessons learned. As small business owners, our best way to create new business processes that raise the bar is to evaluate processes, successes and failures from the prior year. Sit down with your financials, goals and more from 2020 to assess where you hit the mark, how you can improve and what your upcoming goals are. Focus on creating or tweaking systems, processes and workflows to impact your entire business and build a streamlined business. Get insight from Leah's article on page 2 to get started. Finally, learn about how to boost your profits with key workflows from Preston on page 18.

2

GOAL (AND BOUNDARY) SET STRATEGICALLY - Once you've set your new business processes, goal set - and boundary set - to establish a baseline for your business so you know when your processes and plans have succeeded. Learn about goal setting both professionally and personally from Lisa on page 25 and stop wasting time wishing away the days with goal setting tips from Kate on page 22. And while big goals and huge dreams are great for a successful business plan, equally as important (and perhaps even more as Janelle shares on page 10) is focusing on boundary setting and caring for yourself so you can succeed in business.

3

DON'T FORGET ABOUT MARKETING - Marketing touches so many elements of business. Since it's something you may feel like you're *always* thinking about... you may actually *forget* to focus on the marketing processes and planning for your business. Instead of getting lost in the day-to-day of endless posts on social media, do an audit on your marketing plan. You may encounter elements of marketing that you're not taking best advantage of and get a process in place to create content, share it with your audience and bring in more of your ideal customers.

GET FEATURED

We believe in elevating the voices of our community, and we'd love to elevate yours! Submit content for an opportunity to be featured in next month's Rising Tide Society TuesdaysTogether PDF guide. therisingtidesociety.submittable.com/submit.

TRACKING AND AUTOMATING YOUR BUSINESS PROCESSES

Leah Weinberg

While every company is different, there's one thing that sets great business owners apart: They have optimized their businesses with systems and processes that would make it easy to handoff and franchise if the opportunity arose. Now, that's not to say all successful business owners are looking to sell; it simply means that a great company is one built upon a framework that is streamlined to the point that anyone else could pick it up and run with it.

If you could give someone a handbook about your company and they were able to keep it going just like you would, it means that you don't have to have your hands *in* the business all the time. No matter your goals for the future, this is the level of automation and efficiency every industry professional should aim to achieve.

Now, the journey towards automation looks different for everyone. We all have our own way of doing things and the only right answer is to find whatever works best for *you*. I'm very much a manual kind of person, but you might discover certain virtual tools that support you better than a basic spreadsheet. That's fine. This guide will walk you through *what* to do in order to automate your business processes, but you have the power to determine *how* to do it.

A CASE FOR AUTOMATING YOUR BUSINESS PROCESSES

Automation is a way to free up your to-do list and turn your attention to important revenue-building tasks like client work, sales consultations and marketing outreach. Many businesses have certain tasks that are necessary, but don't feel like a good use of time. For example, it might make sense to have a CRM platform like HoneyBook send invoices automatically, rather than keeping up with every client's payment schedule and manually sending the emails yourself.

If you consistently feel like you're stretched too thin, you'll find that automated business processes, systems and workflows will help you to find more space in your schedule to focus on what matters most. It also helps to organize your internal operations by ensuring nothing slips through the cracks.

When it comes to automation, a common concern among creatives is the fear of losing the authenticity that comes with personal touchpoints with clients. However, it's quite manageable to find a healthy balance between automated processes that save you time and genuine engagement with current and prospective clients.

Let's look at some areas where automation can help you to streamline processes and develop a cohesive workflow that works for you.

TRACKING INCOME AND EXPENSES

If we're being honest, this is probably the biggest dread of most creatives. You start a business because you love your craft—whether that's design, stationery, photography or something else—but you find yourself stressed too often over the idea of bookkeeping. Many businesses pay quarterly taxes, which means accounting is a year-round necessity. You must have a good grasp on your income and expenses to estimate your quarterly payments.

However, that doesn't mean you have to personally crunch the numbers. Instead, hiring an accountant can make this a simple process and ensure your business remains financially sound while you focus on other priorities. Likewise, you may find a digital tool like QuickBooks or GoDaddy Bookkeeping may be helpful.

If you go the virtual route, be sure to link your business accounts so every transaction is automatically accounted for in the system. As you spend money, save receipts and jot down a quick descriptive note. Then, at the end of the month, match your receipts to your books and add in descriptions to keep you organized. If you're doing this yourself, I recommend keeping this as a monthly process, as it will be much more bearable than scrambling to reconcile a quarter's worth of expenses at once.

Photo by Jess Bailey

MANAGING INQUIRIES

During busy periods, it can feel like your inbox is bogged down by new inquiries that need to be addressed. This is a great problem to have, but can be made easier by automating your business processes. Keeping this part of the sales funnel organized ensures that you're in the best position to respond to each and every inquiry, opening your business up to new opportunities. First and foremost, be sure your inquiries are all being directed to a single platform — this is typically an email inbox or your HoneyBook account or other CRM platform.

It might feel easier to let inquiries play out in your Instagram DMs or the messaging system on The Knot, but it will ultimately become confusing and force you to split your attention in multiple directions. For anyone who inquires outside of your inbox, ask them to reach out via email so you can capture their information and keep your correspondence top-of-mind.

As for responding to inquiries, using an auto-responder can be a helpful addition for those who have a high volume of work. It can also be a simple way to answer FAQs by providing a link to your website or providing important booking information. However, it's best to keep auto-responders for the initial inquiry, so you can follow up personally afterwards and begin building a personal connection. Email templates can be a comfortable middle ground that saves you time when replying to inquiries, but still allows you to customize those responses a bit.

MONITORING LEADS

There is a wealth of information to be gleaned from monitoring leads and tracking your booking process. However, in order to take advantage of those insights, you'll need to have a system in place to keep everything organized. It may be something like HoneyBook or, if you're like me, it may be a simple spreadsheet. Either way, you should have a snapshot of the important information you need at any given moments. For a wedding professional, that may look like:

Number of open inquiries, including:

- Inquiry date
- Couple's names
- Wedding date, if known
- Wedding venue, if known

Current status *(Example: Proposal sent? Phone call scheduled? 3rd email follow-up?)*

How they found you *(Note: You can easily capture this in your contact form!)*

When you have all of this information in one place, you'll be able to assess your performance based on the inquiries you've generated to date. You will also have a better understanding of when and why certain leads decide not to book. Perhaps you learn that you're far more likely to book a lead if you get them on a video call, so you know to focus more of your sales efforts on video consultations. Maybe you realize your paid Facebook campaigns aren't sending as many inquiries as you'd hoped, but Instagram has been particularly successful in generating leads.

All of this information can—and should—inform your sales and marketing approach going forward, but you can only capture it if you have an organized approach to monitoring leads.

CLIENT ONBOARDING

You must have a process to onboard new clients, as it's your first opportunity to wow your clients with an excellent brand experience. If you use a CRM program, you simply need to add their details and schedule out dates for certain touchpoints, like invoicing and booking deadlines.

It also helps to have a running checklist for onboarding to ensure the process is consistent, both for your client and for your internal operations. For example, you may want to send a welcome email to every client, but you should also be considering what you need to do on the backend, like updating your income spreadsheet, creating folders for them in your inbox and adding dates to your calendar. Everything should be written down so you don't have to rely on remembering every little detail.

CLIENT OFFBOARDING

Although it doesn't get the attention that onboarding does when discussing tracking and automating your business processes, the offboarding process is instrumental for a great client experience and to capture those positive reviews that should trickle in in the weeks following an event or client experience. Some people have more formal offboarding processes than others, but at the very least, you should be including a few things into your workflow.

In particular, sending a thank you note after the completion of an event is always a great way to close out a working relationship. It also gives you an opportunity to follow up on anything that didn't go as planned and request feedback that can inform your client experience going forward. This is your chance to build up your online reviews and testimonials, so be sure to send along links to Google, The Knot, WeddingWire, Yelp, Facebook or a testimonial form you've created.

If you're a wedding professional, it's best to do this several weeks after the wedding, as you don't want to bother the couple while on their honeymoon, but you want to reach them when they're still glowing from post-wedding bliss. Create a calendar reminder to notify you when it's time to get back in touch to complete the offboarding process, or incorporate that into your CRM workflow to automate the process.

Automation doesn't have to feel like an overwhelming structure of complicated tools and databases. Instead, it can be as basic as creating email templates, refining your workflow until it's optimized to where you can take a step back or setting calendar reminders for yourself. It doesn't mean you should let go of your business completely and trust technology to steer the ship. Automating your business processes simply allows you to reallocate your time and energy to the tasks that you value the most.

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Photo by Jama Finney Photography

HOW TO STREAMLINE BOOKKEEPING FOR YOUR BUSINESS

Tanya Hirschy

Does the start of the year have you thinking about how to streamline bookkeeping for your business?

Let's put it this way: We all have one. A messy closet. A junk drawer. The place where we can close the door and forget about the disorder, at least for the time being.

For many creative entrepreneurs, that 'messy closet' is the financial records for your business. You keep the door closed and ignore the books until tax time or a crisis hits. When you open the door and everything comes spilling out, you remember the vow you made that 'this will be the year' to get organized financially and tidy up your bookkeeping.

GETTING MOTIVATED TO STREAMLINE BOOKKEEPING FOR YOUR BUSINESS

Our family recently stayed with some relatives who live in a gorgeous, clutter-free home. We all noticed how peaceful and calm we felt while there. When we came back home, I was extremely inspired to replicate that peaceful feeling. I used that as motivation to start a major decluttering spree in each room of our house.

When it comes to your business, it's hard to get motivated to dig into the nitty gritty numbers. There are so many other things on your plate and the record-keeping constantly gets pushed to the backburner.

But what if you knew that the end result was peace of mind, freedom and more money in your pocket? That's what organized, up-to-date records can do for you.

START WITH TAXES TO TIDY UP YOUR BOOKKEEPING

If you're dealing with a 'messy closet,' start with tax compliance.

Are you up to date with paying your taxes? If you are a year or more behind, put all of your effort into getting caught up to the current tax year. Don't let overdue taxes keep you from driving your business forward.

You may need to hire a professional bookkeeper to at least catch you up to date and get everything ready for your CPA.

GETTING SET UP FOR PROPER BOOKKEEPING

If you're up to date with tax filing, start at the beginning of this year. You need to make sure that you are tracking all money coming in and out of your business.

From the beginning of the year, you will categorize all of your income and expenses for the year. If you're already using accounting software like Quickbooks Online, make sure you have connected all business bank and credit card accounts. These will automatically pull transactions from your bank feed into Quickbooks.

When you set up your accounting software, a Chart of Accounts was created. This is basically a system for organizing your accounts and classifying your transactions. When you have a Chart of Accounts set up properly, it will be easy to put your transactions into the correct categories. Print out a cheat sheet for yourself to make sure you are consistently choosing the same categories. See example below of a sample photography Chart of Accounts.

Sample Chart of Accounts		
Wedding Photography Income	Income	
Personal Branding Income	Income	
Photography Services	Income	
Owner's Draws	Equity	For owner's draws or personal expenses
Merchant Fees	Cost of Goods Sold	Fees from Stripe, Square, Paypal, etc
Photo Supplies	Cost of Goods Sold	Stuff used for sessions - Props, backdrops, outfits, etc.
Production	Cost of Goods Sold	Services used after sessions - retouching, prints, albums, etc.
Studio or Equipment Rental	Cost of Goods Sold	Temporary rental use
Subcontracted Services	Cost of Goods Sold	People used for sessions - second shooters, retouchers, assistants (not a VA)
Advertising & Marketing	Expense	
Auto Expense	Expense	Lease, gas, tolls, insurance, repairs
Bank Services Charges	Expense	
Business License, Taxes & Permits	Expense	
Charitable Contributions	Expense	
Dues & Subscriptions	Expense	Dues to professional memberships or subscription sites
Education & Research	Expense	Coaching, seminars, conferences, books
Equipment & Gear	Expense	Camera gear, phones, computers
General Office/Admin Expenses	Expense	General office and studio supplies
Gifts	Expense	
Insurance Expense	Expense	
Meals	Expense	50% deduction
Office Assistant or Studio Manager	Expense	Virtual assistant, studio manager
Payroll Taxes	Expense	For S-corp
Phone & Internet	Expense	Phone and internet bills - not webhosting
Postage & Delivery	Expense	
Professional Services	Expense	accounting, legal
Repairs & Maintenance	Expense	on computers and equipment
Rent	Expense	
Salaries & Wages	Expense	For S-corp
Software	Expense	Software used to run your business - Adobe, 17hats, Acuity, QBO subscription, presets, templates, etc.
Travel Expense	Expense	Parking, Uber, taxi, public transit, flights, hotel
Utilities	Expense	

START AT JANUARY 1 TO STREAMLINE BOOKKEEPING FOR YOUR BUSINESS

Starting at January 1, you will categorize all of your transactions for the year. Office supplies will be categorized to… office supplies. Assistant pay would be categorized to a COGS subcontractor account. And so on.

Hopefully any business-related income and expenses flow through your business bank and credit card accounts. If there are any business purchases made from your personal accounts, you will want to make sure these are manually entered into your records.

After you've finished the first month, you will reconcile all of your accounts. This is a very important step that many people miss. Reconciliation (think old school checkbooks) will ensure that your books are accurate and catch errors such as duplicate entries or missing transactions. In Quickbooks Online, you can use the reconciliation tool to easily compare what is in the system to your bank or credit card statements.

Categorize and reconcile month by month until you are all caught up to date. You can see the fruit of your labors by pulling a Profit and Loss statement and Balance Sheet to make sure everything is categorized properly.

If you don't have accounting software set up yet, start with a good old Excel spreadsheet. Enter transaction details on each line: Date, amount, vendor, description and category. You can refer to the sample chart of accounts for category options. Once you have the data entered, start a new tab with the totals for each category. These totals are the numbers you will use for tax forms.

Photo by Jama Finney Photography

MAKE BOOKKEEPING A MONTHLY HABIT

Once you're caught up to date, make it a habit at the end of each month to categorize and reconcile the previous month's transactions. Not only will you be current with your bookkeeping, but you'll be able to make informed decisions about spending, cash flow and revenue goals.

Your accounting software has many features that can automate and speed up the process. Just make sure you know how to use these features properly, as they can cause a mess if used incorrectly.

Speaking of Software...

WHICH SOFTWARE SHOULD I USE FOR ACCOUNTING FOR MY SMALL BUSINESS?

There are many good options for accounting software. Some are free, some are not. Some are combined with workflow software. Some stand alone.

Quickbooks Online is a go-to accounting software to streamline bookkeeping for your business that most CPAs will already be using. It will connect with your bank feed and has automations that will help in your workflow. There is a bit of a learning curve, but it's a great option for businesses who want their books to be as professional as their business.

Another great feature of Quickbooks is that they integrate nicely with HoneyBook and other workflow software/CRMs. Their integration will automatically import invoices and payments into Quickbooks, and make it easy to match with your bank feed.

Note: Quickbooks Online is sometimes confused with Quickbooks Self-Employed. It's the same company, but Quickbooks Self-Employed is meant for independent contractors and is somewhat limited. It is less expensive, but if your business is substantial and growing, we recommend getting properly set up in Quickbooks Online.

A TEST OF ORGANIZED BOOKS

If your accountant asked you today for a Profit and Loss Statement or Balance Sheet, what would you do? Would you panic?

If you can confidently download those reports and send them off, congratulations. If, like many creative business owners, you would start sweating and stalling, then take a good look at your current system.

Try pulling your Profit and Loss Statement and Balance Sheet. Are they simple and well-organized? Are you able to clearly understand your revenue and profit margin for each month and year-to-date? If not, it's time to do some research and/or call a professional.

The goal of organized books is first of all tax compliance. The IRS wants an accurate record of the money coming in and out of your business each year.

The next goal when you streamline bookkeeping for your business is learning from your numbers so that you can truly grow and scale your business. Making proactive, strategic decisions is key to a healthy business. It could be that messy books are holding you back from increased profit and growth.

It may take some time to declutter and freshen up your financial records. It may get worse before it gets better. But on the other side of the mess are up-to-date, 100% accurate records. And with those, you will be able to analyze, strategize, scale and increase earning potential. You'll be empowered to reach your goals and grow your business.

So...no more messy closets in your business. It's time to open the door, tidy up and tackle it head on. Happy cleaning!

Ready to tidy up your business bookkeeping and finances? Mention **HB2021** when you inquire to get one free month of bookkeeping services or $100 off Quickbooks setup from Tanya.

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Photo by Christina Wocintchchat

MY BEST BUSINESS PLANNING TOOL: WHY BOUNDARIES MAKE ME A BETTER BUSINESSWOMAN

Janelle Christian

The best business planning tools in my entrepreneurial toolkit are rest and intentional time to decompress.

And I know that sounds completely counterintuitive, but hear me out.

When I've gotten enough rest (or time away from my phone and/or computer on the weekends), I perform better: I work faster, I'm more efficient, I feel refreshed, I feel more creative and get better results for my clients. Rest is more than just a nice afterthought; it's necessary for my business' success.

Since becoming an entrepreneur, complete and rejuvenating rest has been a lot harder to come by than my days working in corporate America.

As I'm sure many of you experience, I feel a tremendous amount of pressure to keep the financial train on the tracks, and as a solopreneur, I feel that pressure tenfold.

This fall, I realized the culprit to my diminished ability to rest and relax wasn't a blip in my night routine or the downfall of my diet. Instead, my inability to rest and relax were rooted in my boundaries (or lack thereof).

Boundaries are hard for all of us. We're nervous to exercise them and we're offended when they're exercised against us.

But the truth?

Healthy boundaries make us significantly happier, notably more productive and make all of our relationships better.

Creating and enforcing boundaries have single-handedly made the largest impact on my wellness and well-being. Here is how I created, communicated and enforced healthy boundaries that bloomed the happiest and most balanced version of my business to date and proved to be the best business planning tool.

1. DEFINE WHAT'S IMPORTANT TO YOU

When I first started to consider healthy boundaries, I made a list of things I wanted in my life that were currently lacking: at least 7 hours of sleep, regular exercise, home cooked meals, time with my pup and one "social" night a week.

As work became overwhelming, I'd quickly strip all the above essentials from my plate and start to feel as though I was living for the sole purpose of working. If you're anything like me, I'm willing to bet that the reason you run your own business today is to avoid the exact feeling I'm describing.

I'd find myself crying about all of the life I was missing out on because I was working. This includes: time with my friends, opportunities to date and most importantly, my health.

Let me give you a hint: anything causing you emotional discomfort and/or resentment is a boundary violation screaming to be remedied. Start your list with ways to minimize or eliminate those negative feelings ASAP.

2. KNOW YOUR VALUE

When I was looking for a new therapist, I found that it was rather challenging to get on anyone's schedule. All the BEST therapists with the highest recommendations only had times available during the workday, and I found that difficult. Same with my business coach. But I somehow managed to make it work, and do you know what I realized?

The same was true for me.

As I began to accumulate higher paying clients in more predictable quantities, I was able to reschedule or refer the lower paying clients who only wanted to meet at inconvenient times away.

Photo by Paul Hanaoka

The truth is that the best service providers have boundaries. Airtight ones.

Telling folks no and limiting access is only an indication that you are high quality and in-demand. Exercising strong boundaries between you and your clients communicates nothing but confidence (and a brief economics lesson on the concept of supply and demand).

3. BE PROUDLY SELFISH

Selfishness has gotten a bad rap.

I'm not sure when selfish became a bad word, but the Webster definition of selfish is, and I quote, "Concerned excessively or exclusively with oneself; seeking or concentrating on one's own advantage, pleasure, or well-being without regard for others."

Is that so bad?

There are certain times when selfishness is inappropriate, for sure. I get that. Hashtag global pandemic.

But when it comes to your (i) well-being, (ii) self-care, (iii) goals, (iv) values and (v) priorities, you SHOULD be SO freaking selfish!!

If "selfish" makes you uncomfortable, try this: every time your brain triggers you to feel selfish, instead, thank yourself for honoring your PRIORITIES.

In order to assert your healthy boundaries, they've got to be a priority for you.

Part of being selfish includes a little entitlement *(which takes us right back to the previous section on knowing your value*). In order to prioritize your well-being, you have to give your personal needs the same weight and importance as your professional obligations.

In the early days of my boundary setting, I had a very challenging time enforcing my list of priorities. Why?

Because I had little to no concept of my self-worth.

Once I truly believed that I was smart, kind, capable and a boss, the natural next progression of thought was to preserve that awesomeness at all costs! It was a lot easier to redirect clients and colleagues when they did anything to diminish my value when I approached it from this perspective.

4. ENFORCE AND CORRECT VIOLATIONS

The hardest part of this whole "healthy boundary" thing for me is enforcing and correcting boundary violations.

I want to say especially with my work, but also especially with my family. And especially with my friends. And basically with everyone and anything.

Here's what I've learned: You've just got to start.

Here's the game plan: You enforce just one little boundary (like leaving the office/ shutting work down at X:XXPM). And you do it every day unless it's an absolute emergency otherwise.

But then once you've started, it gets just the slightest bit easier. And then it's almost easy. And then it's the expectation and you stop having to even talk about it. And then that confidence spills over into a new boundary that you're able to create and begin enforcing.

5. ALLOW FOR FLEXIBILITY

Sometimes you have to cave a little on your boundaries. That's a natural part of this whole life thing. However, I try to keep in mind that every time I cave on my boundary, I am caving on myself. Each time I stay up late to finish work for a client, I'm saying, "this client's needs are more important than my own."

Now, there are PLENTY of times where other people's needs are required to come before our own. The issue occurs when everyone's needs ALWAYS come before your own. The problem exists when your needs NEVER come first.

One way I counsel clients to minimize this trait is to keep a tally. Right next to your computer, keep a tally of how many times you violate your boundaries for someone else and how many times you honor them. At the end of the week, take a look at your totals. If you've violated your own boundaries more than you've honored them, it's time to reevaluate.

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Boundary building is like working out. At first, your muscle is pretty weak, but once you start to use it, you get a little stronger every time you exercise.

And then you become a boundary boss. Just like dat.

You can do this. I believe in you. I believe in us. Let's get after healthy boundaries together, and implement one of the best business planning tools you can find.

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HOW TO PERFORM A QUICK MARKETING AUDIT TO DEVELOP YOUR 2021 STRATEGY

Vicky Wu

Every year, I take clients through a quick marketing audit and planning process for the next year. That planning always starts with an audit of their current online presence.

Where a lot of people make mistakes – in business and life - is assuming everyone is starting at the same place and ending at the same goal. You must know where you're starting to be able to choose the most effective marketing strategies that will get you to your final goal.

For a quick audit of a client's online presence, we cover website, keywords, social media, YouTube specifically if they have videos and basic branding messaging. Here's tips and tools for you to do the same and to perform a quick DIY marketing audit for your business planning.

QUICK WEBSITE TRAFFIC AUDIT

For a website audit, we check traffic, top posts for the year and search position change over time. Additionally, we run a full SEO audit for our clients. The great thing about the website audit is that it's possible to begin that process for yourself.

USE A TRAFFIC AUDIT TO DETERMINE CAMPAIGN EFFECTIVENESS

For general traffic, view Google Analytics > Audience > Overview. Change the date range to the entire calendar year and choose "compare to prior year." Change the graph view to "month" to view overall trends on the graph.

Check these stats:

- Did the number of page views increase over last year (more traffic);
- Did the number of users increase over last year (more people);
- Was average session duration higher than last year (people stay longer); and
- Is the number of sessions per user higher (people are returning more often).

There's a ton more information you'll want to delve into if you're doing a full audit, but these are the quick insights to pay attention to for your initial DIY marketing audit.

FIND TOP BLOG POSTS TO DETERMINE ENGAGING TOPICS

In Google Analytics, use Acquisition > Overview with the same date range as above, and view the chart at the bottom to understand where traffic originates.

For example, a lot of my website traffic comes from organic search, which is great since I do a lot of search engine optimization on my website. The second largest acquisition channel is social media, which shows me that my social strategy is working.

Another stat with helpful information is Behavior > Site Content > All Pages. Remove the date comparison from this view and only use the current year so you see current engagement versus years ago.

For example, one of the top pages in my list of URLs is a quick case study on Blue Apron's marketing. As I look through my list, I see that a few different blog articles I have around the topic of "marketing case study" are getting good traction. This lets me know I could share more of that content. These are also pages I will edit and interlink to my services or products, to turn these top topic pages into converters.

How to use this information:

- Pay attention to which pages are getting the most views. That tells you which topics are most interesting to your audience.
- Note whether topics you don't want to rank for are the ones being seen more often. That lets you know you may need to modify your overall content strategy.
- If landing pages you have been actively promoting are not showing up near the top of the list, revisit your strategy for those pages.

Photo by Kreated Media

QUICK AUDIT YOUR KEYWORD EFFECTIVENESS

Google Search Console is another great tool for a quick audit. Use these tools and tips below for your quick marketing audit.

CHECK YOUR OVERALL SEARCH POSITION

When you first log into Google Search Console, you'll be on the Performance tab. Click the top right of that block on "Open Report." Change the date to the calendar year. There are a couple of things you can quickly check in this view: total clicks, total impressions and average position.

First, click “Average Position” and then uncheck any others so you only see one stat. The goal here is to see that average position number lower over time, which means you’re appearing higher in the search results. This number includes ALL search terms people have used and your site has been in the result list, including some you may not want. Overall you want the average position to be improving, so check the graph trend and make sure it climbs higher over time.

Next, check Total Impressions (and uncheck others). This is the number of impressions your website (and therefore your business) is getting in search results. Make sure that graph is showing an upward trend, as well.

The third piece to check is Total Clicks (and uncheck others). This is the number of people clicking through to your website from a search result. Again, you want to see an overall upward trend in the graph.

How to use this information

- A red flag is if any of these graphs have a downward trend, especially if that downward trend *does not recover.* Updates made by Google or updates you make to your site can cause a drop.
- A downward trend that does not recover is something you need to research further. Run a full SEO audit to start researching causes and determine possible fixes.

FIND KEYWORDS WHERE YOU’RE ALREADY RANKING

Some great data is found in the table under the graph for overall search position. The table shows the exact queries that people have used in a Google search and found your website. Click the “filter” icon and you can choose “average position” which will show you the average search result position for each individual keyword. That’s gold right there!

I am always happy when I have a search term in the top five spots – because that means my website is showing up at the top of page one in search results.

How to use this information:

- Check if there are keywords at the top that you definitely do not want people finding for you when using.
- Pay attention to which search queries that are getting the biggest results. Since you’re already ranking, it’s easy to add some related or complementary keywords to also rank.
- Edit copy on your site to remove keywords you aren’t wanting to rank for. Flesh out those where you already in a top search position.

You can download this chart to be able to manipulate the data further.

QUICK SOCIAL MEDIA AUDIT

Social media quick audits primarily focus on whether the topics we hope are trending are the ones gaining the most exposure and engagement.

USE FACEBOOK INSIGHTS TO FIND TOP PERFORMING POSTS

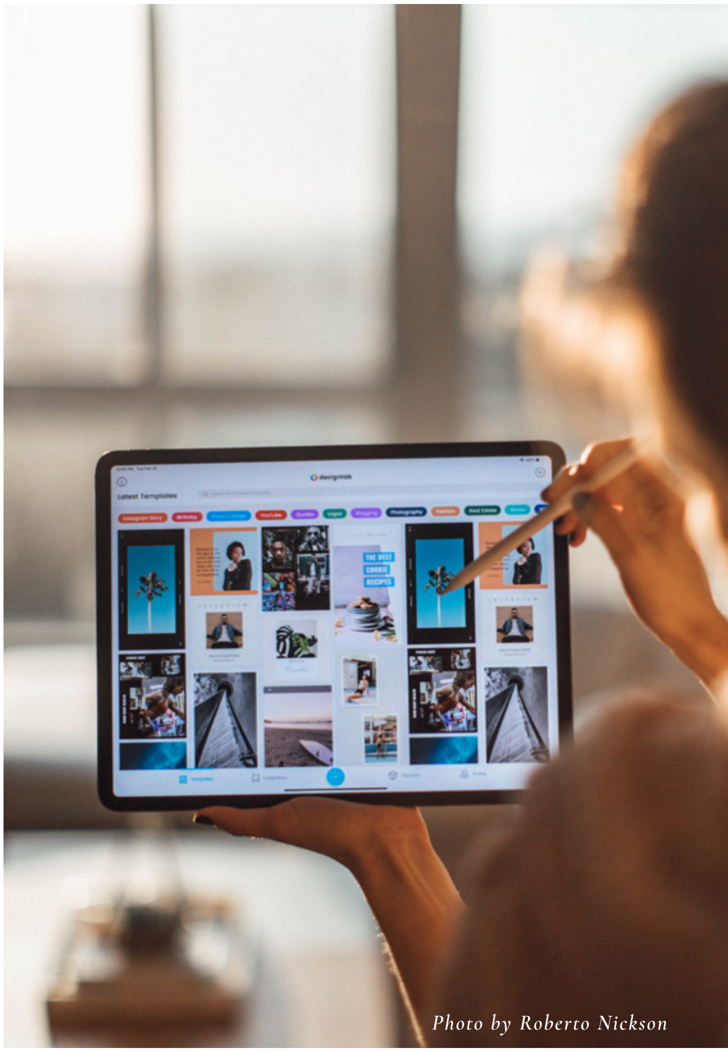

Photo by Roberto Nickson

Facebook readily provides this information on their Insights tab of a business page. However, for best results download the Excel spreadsheet so that it's easier to search. Export using the Posts Data option to review individual post data.

Unfortunately, Facebook limits the number of days you can export at one time; so if you have not been downloading this data regularly, I suggest you download it for the current year by quarter. Then compile them all into one spreadsheet, and you can then easily sort and filter.

How to use this information:

- Use conditional formatting in Excel to highlight posts with different keywords.
    - You can color-code based upon product or service keywords, content pillars, etc.
- Sort each color-coded post by two columns: total reach and total engaged users.
    - Facebook cares about engagement. View which posts overall have the most engagement, plus by each color code.
- Use this data to determine what types of content are performing best with your audience, so you know what to replicate.

USE YOUTUBE INSIGHTS TO TAP INTO THE 2ND LARGEST SEARCH ENGINE

Following your YouTube stats is critical if you use videos in your marketing. This is especially important considering YouTube is the second largest search engine after Google.

Channel Analytics inside of YouTube Studio provides great information. For this quick audit, use two date timeframes – the current calendar year, plus lifetime. Lifetime is important to consider if you plan to monetize your channel, since YouTube requires 1000 subscribers minimum, plus 4,000 watch hours in the past 12 months.

In both date range views, scroll down and check which videos were top viewed, plus check the average view length for each in the list. YouTube prefers videos that get a longer view time (and keep people on their platform longer).

How to use this information:

- Note topics generating the most views and longest views to generate new content ideas.
- Use these top videos and optimize them for video SEO to drive views across your channel and to your website.

Also… yes, you need to be doing SEO on YouTube as well. We've been teaching a course on these methods for several years because we know how effective it can be. If you use video at all, video SEO can be one of the best strategies to increase traffic to your website and increase customers.

QUICK BRANDING AUDIT

A quick branding audit is a great way to fine-tune your brand messaging for your marketing annual planning.

Take the data you've gathered and start looking at your brand messaging. Ask yourself questions like:

- Are the top posts relayed in a way that reflects the brand?
- Are we telling the brand story correctly and effectively?
- Is our chosen brand messaging only found in some poorly performing posts – meaning our selected messaging isn't engaging properly?

Since much of the data compiled also includes images and video, check visual branding as well.

- Are the proper brand colors and imagery being used?
- Does the visual communication reflect our brand voice?

How to use this information:

- Determine if you need to review and update brand messaging and voice – especially with the pivots businesses have made in 2020, this is important.
- Check if you need to revise your visual messaging.
- Choose how to more effectively use voice, messaging and visuals in your marketing.

HOW TO USE QUICK MARKETING AUDIT DATA FOR ANNUAL PLANNING

You've reviewed some key indicators, and hopefully downloaded data as spreadsheets when available. Next up, pop these into a Google Sheet template.

You can copy the template we have developed here. This will help you create a monthly marketing dashboard and see an overview of your results.

Take the data gathered to fine tune existing marketing strategies, choose new marketing strategies and roll it into annual planning. And now that you're ready to do your own quick marketing audit, be sure to access our list of favorite tools and templates at https://vickywu.us/quick-marketing-audit-resources.

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Photo by Thisisengineering

6 WORKFLOWS TO KEEP YOU SANE (AND BOOST YOUR PROFITS)

Preston Lee

When you're a team of one (or just a few), you can find yourself burning the proverbial candle from both ends trying to grow your business.

And while passion is admirable, if you can't fit your passion into some reasonable boundaries, you're headed down a path that can lead to exhaustion, depression, burnout and a host of other issues.

As I've worked with thousands of freelancers and solopreneurs over the last decade, I've noticed one critical difference between those who are clearly burning out and those who work a reasonable number of hours and then enjoy life in their off-time.

That big difference is dedication to workflows or systems.

Freelancers who bring in great revenue each month are most often the ones that prioritize the building of repeatable, predictable actions in their own business.

They focus on getting better at running a business as much (or more) than they focus on getting better at their craft.

They quickly offload any mundane or time-sucking tasks that can easily be outsourced to an app or another person and focus only on profit-generating, important, and fun work in their business.

Today, I'd like to share a few of the best workflows I've seen solopreneurs and freelancers adopt that keeps them sane and boost their business profits at the same time.

Here we go!

WORKFLOW 1: PITCHING & SELLING

The biggest reason I've seen one-person businesses struggle is because the owner gets so wrapped up in the day-to-day tasks, they forget to keep selling.

When you stop selling, you stop booking. When you stop booking, you stop making money.

It's simple.

So, naturally, one of the most important workflows you should focus on is how to sell on a regular basis—regardless of how much work you have on your plate.

How to set it up

At its most basic, consider setting an "appointment" with yourself each week or multiple times a week that's strictly for sales and business development. And then keep your appointment every single time.

For a more advanced option, try using software like Reply to automate your email pitching, experimenting with sales funnels or even hiring a salesperson to constantly be selling for you.

The idea is to build a workflow that forces you to always be selling.

WORKFLOW 2: RESPONDING TO INQUIRIES

Of course, it does you zero good to always be selling if you don't have a good process set up for responding to new client inquiries.

It would be a shame if you optimized your portfolio site and started getting more inquiries than you could handle—only to let far too many of them fall through the cracks.

To avoid this disastrous situation, you'll want a workflow that happens on autopilot (or as close as possible) when you receive an inquiry from a client.

How to set it up

A great basic solution is to have a dedicated email address for inquiries (inquiries@yourcompany.com or something similar) and forward these emails to your default business email address.

Most email providers will then allow you to automatically mark messages from certain senders as important (star, favorite, priority, etc.). That way, you always respond to inquiry emails first.

Alternately, you could hire a freelancer whose entire job is to respond in a timely fashion to email inquiries you receive.

A much simpler (and more efficient) option would be to use HoneyBook workflows to send an automatic response anytime someone fills out your website inquiry form.

This video will show you exactly how you can set it up. Then, each time you get an inquiry, the potential client gets a quick response—even when you're swamped or sleeping.

WORKFLOW 3: GETTING FEEDBACK/ FILES FROM CLIENTS

If your project depends a lot on getting feedback or files from clients, you know it can be one of the biggest bottlenecks you face in your business.

Letting a project get held up for weeks or months because the client won't send their feedback or important source files can destroy your cash flow quickly.

From experience, you may know that you're as likely to forget to remind your client as they are to forget in the first place. In a worst-case scenario, you put off the project so long you lose track of it and never get paid for it.

This is why you need a workflow to follow-up with clients.

How to set it up

If you simply need clients to send files or feedback before you can make progress on your project, you might consider using something like ContentSnare to automate this process.

Even better, you can preempt this issue by using HoneyBook to automatically send emails to your client based on project due dates, when they sign the contract, when the project starts and a lot more.

For starters, you can set up HoneyBook workflows that trigger:

days before a project starts

days after a payment is made

days after a project is completed

And tons more.

To see all the options you can tap into using HoneyBook, click here.

WORKFLOW 4: GETTING PROJECTS COMPLETED ON-SCHEDULE

None of this matters—selling, replying to inquiries, getting feedback—if you can't complete your projects on-schedule.

That's because, when you miss a deadline with a client, you not only delay getting paid, you also send the message that you're unreliable and your client should think twice before hiring you again.

You don't need that kind of bad karma.

Instead, build workflows that will help you get your projects completed on-time, every time.

How to set it up

If you're keeping it simple, get a calendar and hang it by your desk and then live and die by the dates you write for yourself. You may want to consider batching client projects to be more productive.

The better solution would be to find a project management app that you really like and discipline yourself to use it until it's running smoothly. For basic task-tracking (which you can also assign to a project or a client!) try using the HoneyBook tasks tool.

WORKFLOW 5: UPDATING YOUR PORTFOLIO

I recently had a client tell me my work seemed stale, old and outdated. It hurt. And what I realized in that moment was I had been working so hard on new projects, I had let my portfolio grow stale.

So naturally, anytime a potential client decided to visit my portfolio, they weren't seeing my best work.

This can be fixed with a simple automation that you, or your team, can implement each time you complete a project.

Photo by Christina Wocintechchat

How to set it up

When you're building your project to-do-list, make sure to add a few critical tasks after the project is delivered: one of these is to update your portfolio if the project is worthy of including on your portfolio. (More post-project workflows below. Keep reading.)

Or, instead of banking on remembering to add this critical task to your to-do list, use HoneyBook workflows to automatically create a task 1-7 days after the project is completed called "Consider Including in Portfolio."

WORKFLOW 6: GETTING TESTIMONIALS AND REFERRALS FROM CLIENTS

One study shows that word of mouth marketing is the #1 source of new business for freelancers and solopreneurs.

And I believe it.

So if you don't have a system for getting referrals, you're missing out on a huge potential for new business.

Much like considering what to add to your portfolio, you should never complete a project without also sending a follow-up email to your client asking for a testimonial or if they know anyone that would benefit from working with you.

Luckily, you can do that easily from your HoneyBook workflows where you can send an automated email or create a task to send the emails or make the phone calls yourself.

THE KEY TO SUCCESSFUL WORKFLOWS

The trick to creating workflows that actually save you time (instead of causing even more work) is to identify where you're wasting time and effort each day and finding patterns or connections between these time-wasters.

From there, you can start to identify how you handle these issues each time they arise and create workflows and systems based on these repeatable actions.

Over time, you'll adjust, learn and change what you do, but eventually you'll get it so dialed in that your workflows basically run on autopilot. It's a magical thing.

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4 SIMPLE GOAL SETTING TIPS TO STOP WASTING TIME

Kate Presto

2021 might be the year you need some simple goal setting tips. 2020 started with everyone being so excited about goals and making it their year. Then the virus hit and knocked us all on our butts.

But that's not going to happen again this year. We're wiser. We know what to expect. We're resilient. In the wise words of Vivian Greene, "Life isn't about surviving the storm. It's about learning to dance in the rain." This year I plan to do lots of dancing!

Even if you only have 2 hours a week to work on your goals, I promise you can make real progress. The secret is in the baby steps.

When you can break down your goals into its smallest parts, they aren't so daunting. It's easier than you think. And, if done right, you can almost guarantee your success with simple goal setting steps that help you stop wasting your time just *wishing*.

SIMPLE GOAL SETTING TIP 1: BE SPECIFIC

Before you start working on your big goals, you need to be clear about your desired results. You can't work towards a vague outcome, because you'll never know if you're done.

You can use SMART, CLEAR, HARD or any other framework to create your goals. As long as you have a concrete picture in your mind's eye about what "finished" looks like, you're ready for the next step.

Let's say your goal is to increase sales in 2021. To be specific and exact, you want to increase sales by 10%. Your 2020 sales were $100k, so you want to make $110k this year.

SIMPLE GOAL SETTING TIP 2: FLIP IT & REVERSE IT

Now that you know what you want to do, let's zero in on the effort acquired. This is where the magic happens. It requires a little bit of creativity, but that's our strong suit!

My simple goal setting tip? You need to reverse engineer your goal. Break it down into the smallest steps. You can get there by asking questions like:

- What does progress look like?
- What milestones are there?
- How many hours will it take?

Whether it's hours, Instagram Direct Messages sent or pages written, list a few ways to measure your progress. And I mean **your** progress - the **effort** you'll have to put in.

For example, you control how many times you pitch a podcast. But, you can't control how many inquiries you will receive. You know there is a relationship between the two, so let's tease it out. The end goal is to determine an action you can take daily or weekly to make progress on your goal. (In business-speak, this is called a *leading indicator*.)

You plan to attract the clients by appearing in front of other people's audiences. You enjoy podcasts and they're a proven fruitful use of your time. Looking over your past pitches, you landed 1 out of every 4 sent. For every appearance, you received an average of 3 inquiries. You're an awesome closer, so you converted 66% of inquiries into clients for an average sale of $2k.

Photo by Estee Janssens

If these conditions hold true, then:

- To get an extra $10k in revenue, you need 5 extra clients.
- To get 5 extra clients, you need to appear on 3 podcasts (note: we had to round up).
- To appear on 3 podcasts, you need to pitch 12 times.

The smallest step within your control is pitching a podcast.

SIMPLE GOAL SETTING TIP 3. COMMIT

All this planning is for nothing if we don't take action. So throughout the year, your mission is to put in the work.

You've identified the smallest step you have to take. You know that it will lead to results. All you have to do is work the plan. If you do the work, the law of averages promises your success.

You can make it easy for yourself by creating a business process and plan with a system. Deciding what to do and scheduling the time to do it are important parts of any system. Mark out time on your calendar, add a habit tracker in your planner or set an alarm on your phone. Do whatever works for you, or throw everything at it and do them all.

Depending on what your smallest step is, you may want to set it daily, weekly or whatever you deem fit. Personally, I love daily habits because it's so satisfying to check them off in my bullet journal!

To go further and make it super easy, set up a template. In HoneyBook, write a canned email (with prompts to add personalization) and make a media kit as a brochure. It'll make you shine like a pro.

To reach your income goal, you commit to sending 1 pitch a week. Once you've signed all the 5 extra clients you're looking for, you can stop pitching. Until then, you block out time every week on your calendar for you to do the research, write the pitch and click send.

SIMPLE GOAL SETTING TIP 4. REFINE

You've pitched every week, booked several interviews and signed a few new clients. Let's pause and make sure you're on track to reach your goal. We need to revisit the conditions we used to create this action plan and check in on sales.

One assumption was that for every podcast interview you get 3 inquiries. Pull up your calendar to count the number of aired interviews and inquiries received. Are you still receiving 3 on average for every interview? If yes, great! Keep working the numbers.

If you're getting more inquiries or less, you need to adjust the number of appearances (and pitches!) necessary to reach your goal.

Repeat this analysis on the other conditions. Verify that pitch acceptance, sales conversion and average sale value are as expected.

As a 30,000 foot check, I like to look at the financials. Pull up your Profit and Loss report and look at your current year sales. Compare this to your prior year sales to date. If you aren't on track to hit your sales goal, you need to figure out why.

So far, your revenue is 4% higher ($8k) than last year at the same time. You've booked the 5 extra clients already, so you should have hit your 10% revenue goal ($10k). To find out what went wrong, you review each sale. The average price was $1,500, or $500 lower than you expected. You need to make $2,000 more to hit your goal.

This is helpful information for refining your action plan. Let's keep pitching!

To make $2,000 at the new average sale rate of $1,500, you need 2 more clients. To get 2 clients, you need to appear on 1 podcast. Thus, you need to submit 4 more pitches.

Check off that goal and have a dance party!

You implemented these simple goal setting tips, worked the plan, trusted the process and manifested your goal! It wasn't even difficult because you had a system to chip away at it week after week. Plus, you tracked your progress.

Now that you've had success using this approach, you can apply this approach to other goals. By setting clear goals and breaking them down into the smallest effort, you can tackle any goal.

Keep it up! By the end of 2021, you can bask in the satisfaction of completing your goals with these simple goal setting tips.

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Photo by Helena Lopes

CREATING A GOAL MAP FOR PERSONAL AND PROFESSIONAL GOALS

Lisa Anhaiser

Careers in the creative industry cover a wide variety of disciplines - and success can be determined by things like creating a goal map for your creative business. The creative industry offers endless opportunities for individuals interested in being an entrepreneur or self-employed. While many of the jobs have a low entry barrier, they take tenacity and perseverance to succeed. Speaking from experience, sometimes an opportunity drops in your lap, and you snatch it up.

The career we chose may not always be a conscious decision to weigh the pros and cons or match our personal goals with the opportunity presented. We may decide because it appeals to our need to be creative or because we live to be of assistance or the instant gratification of being part of memorable events. Whatever the initial thoughts that made us choose our path, we need to sit down and flesh out the full plan that will carry us through for the long term.

CREATING A GOAL MAP FOR YOUR CREATIVE BUSINESS

It is never too late to rework or even create your goal map, possibly for the first time. It is essential to look at your personal and business goals because the two work together hand in hand. In order to have satisfaction in life, all aspects need to work together. If you are miserable in your work-life, you will carry it home. Plus, in the same way, you will take your issues at home into the office. When we have goals at work that feed our personal goals, we can reach a work-life balance.

WHEN CREATING A GOAL MAP, START WITH YOUR PERSONAL LIFE

It would help if you started by taking a look at your personal life.

Let's rate the areas of our life that give you the greatest satisfaction on a scale of 1-5: 1 being the most satisfaction and 5 being the least..

- Family Time- meals together, quality time and date nights
- Personal Growth- through books, new skills and hobbies
- Money- Your net worth, earnings, expenses, savings, debt and giving
- Health- energy, sleep quality and exercise
- Relationships- the quality of personal friendships, work friendships and meaningful connections

These five categories can give us a good understanding of our feelings of satisfaction in our overall life. This will not be a one and done assessment. You will need to go back to your answer key to understand whether the steps you take are improving your circumstances or just pushing off the problem for another day.

WHAT DO WE DO WITH THE ANSWERS?

The discovery of your biggest areas of satisfaction and wins will give you the fuel to work on your least satisfactory life areas. What are the issues you need to focus on, and how can you take steps to change the outcome? To oversimplify the issues, you can say that your dissatisfaction with money means you don't make enough or that your lack of time at home means you need to quit working so hard. But rushing to a judgment and taking quick action could lead you down the wrong path. Instead, let's take our findings, create goals for your personal life and use those new goals to evaluate your job, career and business goals.

For example: as a small business owner, freelancer or solo-entrepreneur, if you find dissatisfaction in your time at home and want to stop working so hard, you can look at how you operate your business or manage your workflow. You can make changes to fit better your needs and spend less time working. You can also then make changes regarding what you need to receive from your job, including time off, pay and the ability to increase your knowledge and personal growth.

EVALUATING BUSINESS GOALS FOR SUCCESS WHEN CREATING A GOAL MAP

Employers are responsible for the success, viability and growth of the company. We need to look at our business as a living entity and base our decisions on what the business needs to stay alive and prosper. As both solo-entrepreneur and/or owner, you will look at the five main categories when evaluating your business goals and creating a goal map.

- Management and Staff- Cohesiveness of the group, the ability to reach your goals together, and the needs of your employees and helping them be successful
- Growth- Are you maintaining a pattern of profitable growth? Are you increasing your offerings or removing unprofitable areas? Have you revisited your pricing strategy to be in line with your competitors?
- Money or Sales- Do you have working capital, positive cash flow and good sales? Does the company give back to the community? What is your debt ratio?
- Health- Are you in a growth industry, or is your industry in decline? Is your company growing, or has the company become stagnant?
- Relationships- Your relationships with your client base, reinvigorating your past client base and creating positive buzz to develop new relationships.

IMPLEMENTING BUSINESS CHANGE FOR FUTURE HAPPINESS

We can revisit the example about time spent at home when implementing business goals, as well. The creative entrepreneur has the flexibility to make business decisions that will directly affect their personal happiness. One way to do so when creating a goal map: set up your calendar to maximize the time spent with loved ones. If you have children in school, make appointments during school hours, and handle the paperwork after they've gone to bed.

Use time blocks to focus on tasks you do regularly. Plus, spend your time focused on singular tasks instead of trying to multitask. If you work from home, spend your allotted time dedicated to work and not handling home chores in between.

To expand upon business change impacting personal life, use these tips.

Maintain your growth and feeling of fulfillment by taking time to catch up on new information, listening to podcasts or taking a course online.

If you are focusing on relationships, join an industry group, use the monthly meetings to meet new vendors or clients and expand your social network.

If you have employees as a small business owner, take into consideration how business goals and personal goals interact for your employees, as well. Employers can create opportunities for employees to bring in their personal goals and relate them to the company's goals. Find ways to help employees offer meaningful input and set goals for the company to satisfy their personal needs.

Some additional examples:

How can the company support a flexible work schedule to allow maximum home or family time while ensuring completion of the job?

Are you able to facilitate the hiring of or provide the services of a training one or two days a week in the office before or after work to help your team improve overall health.

PERSONAL GOALS AND BUSINESS GOALS INTERVIEW WHEN CREATING A GOAL MAP

No matter how we manage the results, we must first figure out what we need to be happy and successful on a personal level and use those results to create an environment at the office in which we can find success. Understanding that personal goals and business goals work hand in hand will help both businesses and employees find long term success in their chosen profession.

Checking back in to re-evaluate how your plans are working will create a sense of accomplishment and increased job satisfaction for all involved. The saying is, "Do what you love and love what you do, and you'll never work a day in your life" may not be completely accurate, but in this case, a little can go a long way to making it a fact.

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DISCUSSION QUESTIONS

1 What business processes do you need to create or reevaluate this year?

2 What is the most difficult part about implementing the process of bookkeeping for you?

3 How have boundaries, or the lack thereof, proven to be a positive element for your business growth and success?

4 Challenge: Map out the business process and workflow that occurs each time you get an inquiry or sell a product. Ensure you have a smooth process in place.

5 Challenge: spend time implementing Vicky's Quick Marketing Audit.

RISING TIDE | HONEYBOOK BLOG POST

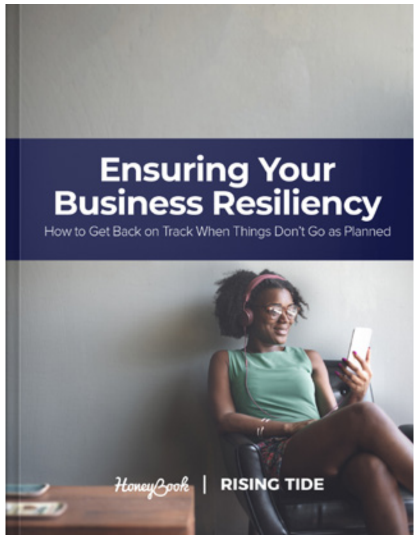
BRESHANA MILLER
How to Create a Vision Statement for Your Business

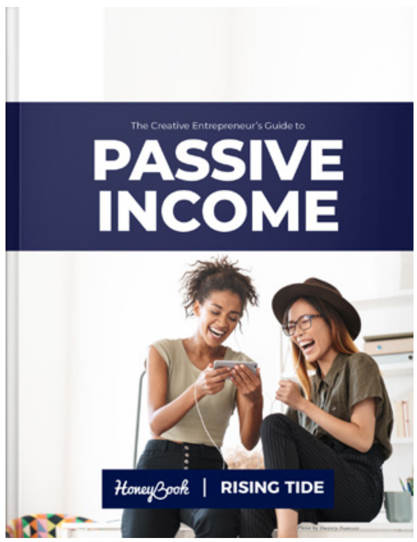
MICHELE PERRY
Doodle Your Way to New Year Business Planning You Love

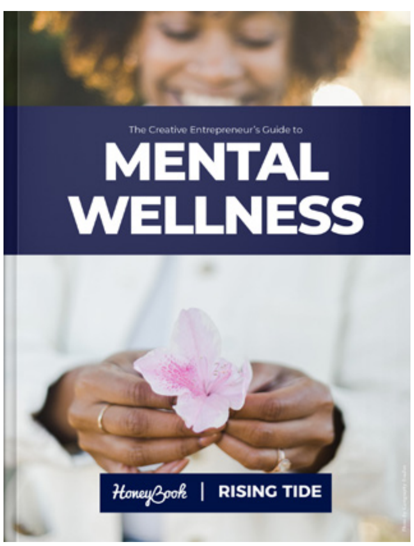
SHIRY BENSCHAR
8 Ways to Control Small Business Expenses

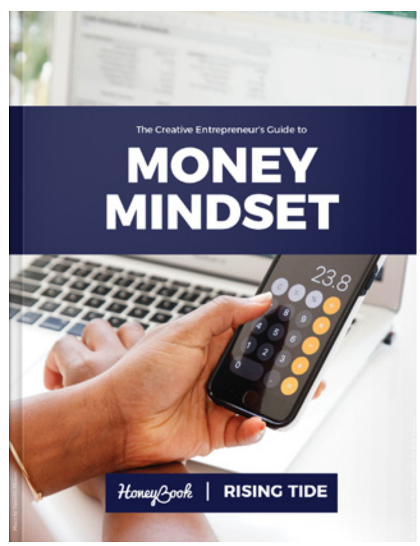
WANT MORE CONTENT LIKE THIS?

Check out our other Ultimate Guides to help grow your business.









WHO WE ARE

The HoneyBook | Rising Tide team believes an empowered creative economy will change the world. By elevating the voices of creatives, sharing their stories, and building a thriving online and offline community, we support creatives in their pursuit of a sustainable livelihood.

Empowerment begins with saving creatives time and money. HoneyBook helps creative entrepreneurs manage their businesses more efficiently so they can do more of what they love. With HoneyBook, creatives can send brochures, proposals and invoices; create the ideal customer experience; and track payments – all in one place. Equally as important are sharing knowledge and providing support. That's why Rising Tide is a community and living library of educational resources, including blog content from thought leaders, monthly guides, online summits, and over 400 monthly meet-ups across the world to help creatives succeed in business.

We're also passionate about supporting the communities around us. To date, we've given over $130,000 to nonprofits including Pencils of Promise, The School Sessions, U.S. Dream Academy, The Birthday Party Project, Thirst Relief and more. We've also partnered with Pencils of Promise to build a school in 2018 funded entirely by community donations through our 2017 RISE Summit.

We believe that magic happens when creatives gather, support one another and are empowered to pursue their passions. We believe in community over competition. We believe in empowering the creative economy to rise together.