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Backslash M Y w. Hello, Sarah, how's it going? All right, Katie. We are on, I don't know, hour five of recordings. We're getting a little loopy. It's fine. It's fine. Hey, people who are listening to this season. This is how Sarah and I are getting it done this time. And because we had to go an entire year without it, we are catching up.

You're like spending a day together. Just having all of the discussions about all of the things. And this season, if you haven't heard previous episodes, we're doing kind of a retrospective where we're looking back on kind of how we used to think about things. How are we thinking about them now and doing a little bit of reflection on like our own.

Maturity as business owners and how we're, we're kind of stepping into and, um, having these new spaces for ourselves and kind of sometimes thinking of things differently. So on this episode, we're going to dive into the topics of time management and project management and how that has shifted or changed for us.

And this is one of those areas, Sarah, where it's like, I don't even remember the tools I was using three years ago, you know, for some of this stuff. Cause it changes so much. But can you, can you think back, I mean, like how has this shifted for you? I mean, I think sometimes we think about it in terms of tools, but are there like.

Philosophical things that have shifted for you. Like, what is this looking like for you in terms of time management and project management? Yeah, I don't, I don't know that that much has shifted philosophically. It's been, it's been really interesting over the last couple of years to kind of try a couple of different things.

Um, so I will occasionally, um, either try a new kind of planner or a new kind of organizational system for a little while just to dabble in it, to see if I like it. Um, so I don't know that a whole lot has changed in terms of my approach to kind of project management, time management stuff. Um, you know, I, I, over the last couple of years I have tried a couple of different things.

So I might try a new piece of software for a little while to see if it helps me solve a problem, um, or a new planner or that kind of thing to do, to see if a different organizational structure, um, Helps me in any way, but I typically kind of end up defaulting back to what I have done for years, which is basically just making lists.

I mean, that, that has been sort of the simplest way for me to kind of process through different kinds of things and get, and getting tasks done. Um, I actually like writing it out. There's, there's something about that for me, that's really helpful and crossing things out. That's also a thing that I find really valuable.

Um, and so, you know, though, there are certainly, I've used things like air table and I use air table for certain kinds of projects. So, um, for example, I have a couple of clients where, uh, it's been sort of like a conference kind of thing, where there are multiple speakers or there are multiple sessions.

And so there's. Lots of moving parts in terms of, you know, who's the tech host and who's the presenter and what's their link and what time do they need to be in what time zone are they on? And, you know, all of those kinds of details. So that, for something, for a project like that, I would use something like air table because I find it really, um, nice to be able to kind of cross reference things and connect records and all of that sort of stuff.

Um, and the collaborative features are really nice for, for that kind of conference planning. But for a lot of other projects, um, it's, it's more about making lists. Sometimes I'll use, you know, something simple like Google docs or sheets in, in Google, Google drive. Um, you know, I use Dropbox for collecting different video files and that sort of thing.

So there are different tools that I use, but in terms of actually. Kind of making my lists and working my way through things. Um, I'm, I'm a little old school. I just liked my lists. Yeah. That works pretty well for me overall. So, um, though, if I, you know, I pick up a few things here and there from these different things that I try, I haven't like adopted a whole new project management system or a whole new kind of planning system, um, in, in the same way that I know a lot of people are poking around with notion, which I hear you or notion fan or were, are.

Oh, my goodness, Sarah. I could just explode with information about time management and project management. Oh, okay. Well, first of all, when you're like, I'm a list-maker, I'm like, Ooh, I have the tool for you. Uh, so you said cold paper? Yeah. Well, it's interesting because you know, when you were saying that I was like, you are going to have to prime my pen and paper for my cold dead hands.

I mean, I used to be totally pen and paper. And I was a huge whiteboard fan too, for people who've been following me for a long time. I had whiteboards in my office at work. I had whiteboards, you know, in my office at home. So I was very like pen, paper, whiteboard focused. And then I made the switch to digital and I actually named the podcast episode, a shocking turn of events when I started talking about how I was using notion, because it really was, I was like, So paper planner based.

And I used a planner called the get to work book for years and years, and it was lists, you know, focused. And then I started using notion, um, which basically became my digital planner. Um, and the primary reason was I was just concerned with starting this new job that I started about a year ago now that I just, I was not gonna be able to handle the amount of information coming in and like handwriting notes, which is not gonna work for me.

Like I really needed to be able to like type and have a place to put everything. And so I started using notion. Um, but most recently, like literally within the last couple of weeks, I have switched to a new tool. And the reason, yeah, it's kind of exciting. And I haven't really talked about it in a ton of public places.

It does feel like a scandal and I I'm going to release another podcast episode as we record this. It's actually probably coming out around the same time that this season is coming out and it'll be called, um, a shocking turn of events, part two, because it's like, basically about me pivoting away from notion.

Um, and what is interesting, like why I was making the connection when you were talking about list-making is. Notion has like so many cool things and I'm still gonna use it for certain things, especially, I think we're working with my clients. Um, but notion is really built around this concept of databases and like that's really its foundation.

And I am like you a list maker. Like I am always about the list. And so there were a couple things in notion that were always kind of frustrating for me. One of them was you can not do recurring tasks in. I know, right. I mean, it's horrible. So for the, from a business perspective, I mean, I'm sure you have the same thing.

I've got recurring tasks for every month. I've got recurring tasks that I do multiple times a year, like quarterly taxes, you know, all these kinds of things. And not to mention, project-based recurring things of like, and you can do templates in notion, but you can't necessarily do recurring tasks in a way that's easy.

So this always bothered me. This was always like, I don't have time to be like copying and pasting multiple things, you know? Like I just know that's not good. The other thing about notion that has always been a little bit challenging for me is I really like visual representations of progress. And you could build in progress bars into a database, but you couldn't put them anywhere else.

Like you couldn't like embed a widget. You couldn't embed like HTML. You can, but it's complicated and I'm just not willing to figure it out. So then I found this other tool. It has recurring tasks. It has progress bars. It has the ability to like group things into what they call a portfolio. So you can like see progress on like things that are connected to each other.

And it allows you to track goals through like multiple, like metrics of how you're measuring that particular goal. And I was like, Okay, I'm sold. I, you know, like this is good, but, but the other piece of it, um, and the tool is called click up. If everybody's like, okay, say the name, name of the tool is called click on it.

I will talk about it in various places. Um, but click up is based on the concept of lists. It's not based on the concept of databases, which for some people could be frustrating cause it's like they don't always put everything into a list, but I happen to put it. Everything into a list. So they have like lists and folders and spaces, and that's kind of the hierarchy of how they're putting things together.

And it has allowed me to basically transition my entire kind of time and project management into click up from notion. And I was able to do it. I mean, people, if they have been following me, they know I've have a lot of stuff in notion. I did this over the course of about a week. Um, where I was slowly kind of morphing things over just to see how it worked.

I wasn't entirely sure I was going to make the switch, but I wanted to kind of play with things. So I am like up for change, you know, like when it comes to project management and time management, if there's a new tool out there, I wouldn't say I'm someone who's like. Flighty about it. I mean, I'm not like taking on a new thing.

You know, I looked at a sauna, I looked at Trello, I looked at some of these things and I'm like, this is not really giving me what I need, you know, so I just kind of waited. And then I stumbled across this YouTube video that was like, is click up the new notion. And I was like, Oh yeah, like what is going on here?

And then I started watching videos and I was like, Oh my God, they had the recurrent test. Oh my God, they have the purpose first. Like, this is, this is helping me when I need it is what I need. So, but I think that this to me, like, I. I again, really did not think I was going to move away from paper and pen and, and even the whiteboards, like I don't really have whiteboards that I'm using consistently anymore because I do so much of it digitally now.

And it has helped me to be more efficient. I mean, bottom line, I, and it's not like that. I think creativity, I still do a lot of handwritten notes and, you know, I journal handwritten, you know, all those kinds of things, but, um, When it comes to juggling a lot of things. And I feel like I'm juggling a lot more things now than it was five years ago.

Uh, it really does help. It really does help. So. Cool. Good to know. Yeah. New shoes. I always love a new tool. Well, when you were like, I like lists, I was like, click up, click up.

In my head to take a peek at it. I feel like I, I think people sometimes think that I like evangelize tools and especially around notion because I talked about it so much, but really I just get passionate about the tool for me. And if you happen to do things in the way that I do things like list focused, you're going to like the tool too.

So I'm not trying to like push anyone into any tool, but when I find something and I'm like, there's progress bars, like, you know, Oh my gosh, like, I'm going to talk about it because it's like, this is a pretty cool thing. Yeah. It's motivating. Yeah. Sidebar. Did you see that that Canva is, is now offering like an affiliate program?

We should definitely sign up for that. I cannot stop evangelizing about, well, did you see too? I had some scheduling tool now. Oh, I did not see that. Oh my gosh. Sarah sidebar, sidebar. CAMBA has a scheduling tool to schedule things into like social media. Oh, I see. It's a whole thing that would make sense, sidebar.

Yeah. They're they're doing good stuff anyway. Okay. Back to the episode topic, I am curious if you have time or project management challenges. That have like cropped up over time, like as your business has changed and evolved. Are there things that are like happening for you now that you're like trying to actively figure out that before it just wasn't really on your radar yet?

Yeah, I would, I would say definitely. Um, yes, uh, mostly with respect to, uh, some of the production timelines and that sort of stuff on the work that I do. So, um, for a lot of clients I'm doing. Kind of some pre-produced virtual videos or events or those sorts of things where I'm doing a lot of production before the event happens or before it's released.

Um, and if I'm doing several of those projects for several different clients, If I'm not careful, I end up with like one week where suddenly I'm doing, you know, a hundred hours of video production, which is not ideal. So for me, the, the hardest challenge, um, for the fall, especially was building out enough time and, and, and production timelines.

That made sense for, you know, this client is gonna get me their videos by this date, which means that I have two weeks to do this portion for them while I'm also getting another client's videos, the following, you know, Monday or whatever. So it was a lot of like, Puzzle kind of plugging in, um, different, different clients into different timelines and figuring out when I was going to have to get stuff done.

So that was definitely a challenge, especially because I was, you know, like everyone fairly new to the virtual acquire video production, which is kind of its own beast because it, you have so many different video files that you're working with and yeah. There's audio mixing and video mixing, and like there's a whole process that you have to go through.

Um, and so depending on the size and depending on kind of your system for doing a virtual choir video, you know, each one can take hours and hours and hours. So you have to kind of budget that out. And as you're still learning it, you know, it's going to take longer. And so, um, For me, I w there was a lot of guesswork involved.

There was a lot of like, I think this is how, um, so it was, it was a lot of figuring that out. I have a better sense now for kind of what I need. And I also, um, you know, Katie, as we've talked about kind of previously, you know, I have. Other people I can rely on to help with those sorts of things. So I have a few people that I subcontract with for certain portions of, of video production work nowadays.

Um, so that's been great. Like if I feel like, Oh, okay, I can't hit that timeline, but I know somebody who might have a few hours to help with this, I can, you know, kind of farm that out to them. So, um, figuring out some of those pieces has been a bit of a challenge. You know, the other part is just keeping all the projects straight, you know, who I'm, who I'm working with and which video projects I'm doing for which client at which time, and, you know, so those kinds of details things.

Um, I used a lot of just sort of calendar hacks and that sort of thing in, in Google calendar to kind of make that easier for myself, but I also then wrote everything out as well. So then I kind of had a. A pretty good idea kind of week by week throughout the rest of the entire fall. Like, okay, this week, these are the things I have to work on.

That means that next week, these are the things I have to work on. So I was able to kind of plan it out in a way that I knew what was coming. And I also knew. Okay. I can't take on anymore. Or if I take on more, I have to subcontract it because I can't, I personally have no more time. So, um, that was kind of the biggest challenge is sort of figuring out what that was going to look like.

Um, and I think the challenge for, for me this spring will be similar, um, because I am doing some different kinds of events that I haven't done as much of before. So it'll be figuring out. And guesstimating, right? How much time is going to go into each project for each client. So I think that's, that's been the sort of most interesting change, um, In terms of project management for me has been, uh, just, just the sheer production time and planning time and, and making sure I've got enough of a buffer built in that.

I don't drive myself crazy by, you know, I'm making sure everything doesn't line up in the same week, for example. So, um, yeah, that's been my biggest one. Katie have, have you had any big kind of shifts in either types of projects thus? You know, resulting in some project management shifts or, uh, anything like that.

That's, that's hitting for you right now. I feel like the biggest shift that is kind of creating a challenge again, happy to have this problem, uh, is that I have a lot of clients. Um, and because I do a lot of one-on-one work. There, and this is what people talk about all the time. So I'm just going to like put it out there.

They were like, well, this is why you can't scale, you know, one-on-one coaching. Um, because you've run out of time, um, which is true, you know, I get that. Um, but I also feel like it's incredibly rewarding work and I'm not willing to give it up. So, um, this is why we have coach training. This is why I have group coaching and other things that are more at scale with larger groups of people.

But, um, Really, the thing I'm running into now is I am bumping up into needing, uh, to probably limit how many clients I'm taking on. Um, and I'm actually surprised it hasn't. Been an issue before now? Um, because I just, I feel like I've had a lot of clients, but they've just staggered themselves just right.

But like, I literally just had someone, we just took a break in between recording and, um, I looked at my email and somebody was like, so you're booked out for the next two weeks. Can I get in before that? And I was like, sure, let me find an hour somewhere where I can make this happen. Um, And so that, that is like, you know, I feel like it's the thing of, like you take in more PhD students than there are jobs.

Like if you take in more clients than you have time for nobody can ever book you, you know, and that's, that's a problem, you know, clients need to be able to book your calendar. So I think that that is again, good problem to have definitely grateful, you know, that I have, um, this issue, but I'm having to kind of think more strategically about what do I do and S and I'm also, um, I'm also starting to be more planful about and just intentional about booking time off.

And usually it's like half day on a weekend, you know, that I need to take. And it's honestly not always time off. Uh, if I'm, if I'm being honest, it's more like it gets used for like podcast editing or something else, but it's like, I don't really have free time if I don't block it. Because of the evening work and because of the weekend work.

So, and a lot of this is happening through, um, speaking of time management acuity calendaring system, which is like my automated calendaring system. And that has saved my life. I chose to do that so much later than I should have. Um, and it's been so helpful to be able to just say what the times are and.

And I can also easily block things where it's like, you know, I don't want to have Thursday evenings or Friday evenings or whatever. Um, but right now my schedule is basically after work. I usually take an hour between five and six to just like decompress. And then I work from six to eight every night, whether that's a coach training.

Or right now, actually a yoga teacher training. Cause I'm in yoga teacher training because that happens one night, a week or it's clients. And when I get really slammed, I will sometimes open up that five to six o'clock hour, um, just to like let four more clients in basically, um, during the week. But it means that I'm like back to back from sometimes eight in the morning until.

Eight at night, which is obviously not ideal. So, you know, just kind of work out some of those things. I mean, I feel like I'm not at a place where I don't feel like I'm approaching burnout. I mean, I think some people would look at that schedule and be like, wow, that's like a serious red flag. It actually doesn't feel that way to me.

I, I mean, I think part of it is because I get up so early that I have that time to myself. I think part of it is that on the weekends I take evenings off. I take Fridays off to do like date night with my partner. So I have like these pockets of like multiple hours where I can kind of do what I need to do.

I also think the remote work situation is really helping me because I can like throw a load of laundry in, in the middle of the day. I I'm able to cook what I want to cook, you know, a lot easier. So I do a lot of bulk food prep right now, which makes it, like, I just literally go to the fridge, grab my meal and I'm good to go.

Um, because I just make things really easy. So, but yeah, I mean, it's, I'm pretty tightly scheduled these days and that was definitely not something that I was dealing with early on. I felt like I had a lot more time for like product creation, um, even content creation, like podcasting and things like that.

And now I, I try to bulk podcast. I try to do all the podcasts for the month, you know, before. It starts just so that I don't have to worry about what am I going to fit that in, you know, during the week. Um, so yeah. Yeah. I hear what you're saying, especially with respect to the, um, like blocking your calendar for certain things.

I need to be a little bit, I know that I need to be a little bit better about some of that, especially for some of the work that needs to get done. That is. Either on the business itself or creative work that I need to do, you know, there, there are these things that are like hovering around in the back of my brain that I'm like, Oh, I need to spend some time on that.

What am I going to do that? Um, so that, that is certainly something that I also need to spend some time on is like blocking those special times. Um, you mentioned acuity, I've been using calendar as sort of a way for, especially for initial. Consultations. So I offer like a free one hour consultation for whoever needs something.

And so when they get in touch with me, I can just say, Hey, find a time that works for you on my calendar here. And then it just pops up on my calendar. It's great. So yeah, so much better when that, when that happens. The only thing I have to remember is to go in and check and make sure like any meetings that I've scheduled to personally also reflected there and some of that, but, um, yeah, no, it's, it's nice to have a way for people to get.

Uh, you know, get time on your calendar that doesn't require six emails back and forth trying to figure out, Oh, can you do this day and this time? Oh my gosh. Yeah. I mean, it's, it would kill me. I mean, the number of people now that I'm juggling. Um, and I mean, I'm not meeting obviously with this number of people every week, but I've got like 50 to 60 open clients right now that are juggling different sessions.

And some of them are just like one-offs here and there that they came through a program and they got like a free coaching session. And so I still haven't scheduled with them, but. It's still, you know, one more person that's, that's kind of on that list. I would also say though, something that I did just like within the last six months that I felt like was kind of a game changer for me was when you were saying I've got all these things, like on my mind, you know, that I want to be giving time intention to, I created a space originally, a notion.

I moved it over to click up that says, um, if I had more time and space in my brain, This is what I would work on. And I just started listing things and kind of taking notes on each of those things. So for example, one of them was, um, finding a way to build my own link tree for Instagram on my website.

Well, one morning I had like a free hour and I just Googled it. Created it boom done. I mean, but part of it was just like listing it there so that I could see these things on a regular basis. So like building a product around project management is on that list. Writing my next book is on that list. Like, but I've been able to check off a surprising amount of things just because I wrote them down and I was seeing them on a consistent basis and like, Letting the back of my brain kind of noodle on some of that stuff.

But yeah, that's been helpful because I feel like it motivates me to, I needed out of my head. I mean, I just, I, I have to have it on the page. And so it's been helpful to kind of write some of that stuff down because I do feel like there is a magic to writing these things down because you eventually do get around to doing them.

Yeah. Yeah. Well, I guess I know what I'm doing with a free hour this week is writing all that stuff down. Do I have a free hour this week? I don't know where we're going to find out. Neither one of us do you know? I mean, obviously we're not in the MySpace anymore where we can do that, but yeah. Yeah. I mean, I think that it is, for me, it's also helpful for me to see how many of those things that I put on a list.

Do I eventually like fade into the background or do all of them come to pass? Like it helps me to see. To what degree should I let something sit kind of on the back burner, just so I can kind of sit with it and make sure it's actually what I want to spend my time doing. Um, but it's also how I created some of my goals for like 20, 21 was I looked at that list and I was like, is there anything on here that I really want to move forward and, and make time to dive into?

And so it made it easier to think about it from that perspective too. Yeah. Yup. Oh, project management. I feel like it's, it's an ever evolving thing, right. Because depending on the project, so you can, depending on what you're doing, it, it's just going to kind of morph and change depending on what you're working on.

But it's always interesting to hear well, and it was really interesting this year to go through getting a certification in project management. And like really understand it from a more formal perspective, because I think how we talk about project management, especially in higher ed. Well, first of all, we don't talk about it.

So let's just say that. I mean, we're not trained in it in, and I had so many of my clients, you know, coming to me and saying, can you help me figure out. You know, um, this grant project, or like my three to five-year plan or I, I feel overwhelmed and I don't know how to track my projects. I mean, like just a lot of things tied to project management and I ended up creating a new service this year that I'm calling a VIP day, which is basically you book for an entire day of coaching with me, where we can do like.

We can tackle a bigger project. Like we can, we can work on a grant thing you're doing, or we can work on, I mean, there's so many possibilities, but three to five year planning is what a lot of people are kind of using that kind of thing for. And, and that was interesting to just kind of think about like, how can I serve this need of my audience that is also related to project management.

So yeah, doing the credential, which. It's so based in industry and it's like learning another language. I mean, it is like nothing. There's so much of that 80% of what I was studying for that. It's like, I've never encountered this. I have no idea what this is. Like I, you know, so it was helpful. I mean, I was a huge learning experience, but I feel like there, it was also helpful for me to just be exposed to like, there's theories around this there's methodologies around this.

And I could even put a name to some of those things and say like, Oh, so when my client is struggling with this, this is what it's called, you know, like, and I can introduce that kind of nomenclature to my clients and to myself, you know, when I'm struggling with things. Um, so I, I, it's not that I would recommend that everyone went out and get a PMP, but I think that give me six months and I'll have a program and you can come through it if you're struggling with project management, because I mean, yeah, I it's just one of those areas that it's really, it bothers me that there's these certain areas of higher ed that we're expected to like, just figure out teaching is another one of them that a lot of people just don't get training in and it's like, This is a whole thing.

I mean, well, and it's a whole part of the job description for, so I mean like you're going to, this is what is going to help you be successful and we're going to like hide the cookie and not tell you to do it. I mean, I just, I find it really crazy. So, yeah. So I think that this is something that I feel like there areas of.

Having the business and working on the time management and project management kinds of things I've had to do in the business that have very much translated into my day job and making me a really efficient worker and a strong project manager, because I've had to do it, you know, across. And, um, I think that's something else for people, you know, if anyone's listening and they're kind of thinking about.

How do you juggle these things? You know, like the business and the full-time job. I mean, a big part of it is like, there's, there are skillsets that crossover and that influence each other in really positive ways. And I feel like time management and project management is one of those areas where that really happens a lot.

Right, right. And keep it. Yeah. It's a lot of it is an organizational. Issue. Right. And I don't mean that like big O organizational, I mean like individual on an individual level, getting organized. Right. And figuring out what works for you and how you're going to make a system work in your favor and, you know, make sure that you you're checking all the boxes or.

You know, hitting all the databases correctly. I don't know what the corollary for that in notion might be, but yeah, but making sure that you're, you're building something that works for you, that you can note progress and kind of keep moving forward. Like that's kind of. At least for my perspective, like that is a huge portion of what makes project management possible and what makes being an entrepreneur and business owner possible.

Like if you're not able to, to kind of juggle those multiple things. Um, and if you don't have a system for that in a, in a way of doing that, like it's going to be a struggle because that's one of the main things you gotta figure out how to do it. Yeah, yeah. Yeah. Well, and I feel like there's something around that.

That's tied to, like you were saying, really understanding who you are really understanding what your strengths are and a lot of self knowledge about. What you need. I mean, even this concept of like, I function with lists, you know, like understanding that as a practice so that you can build that into your structure.

But I also think that there's, there is a business model, which I think both of us have engaged in this concept of the productized service, where you take a service that you offer and you turn it into something that is consistently what people get. So it has a template, an email to onboard the person. It has a.

Checklists of things that they go through every time, you know, like, and it doesn't mean that each project looks the same, you know, I think about like my coaching clients, they get the same template, a dashboard in notion, but the sessions are radically different, you know, every time because the client is bringing different topics, but it doesn't mean that I'm recreating the wheel.

Every time I'm onboarding a new coaching client, they get the same template, email with all the same links, you know, like it's, it's like. I give them the same information and even having stuff like that, I feel like that's a huge part of the startup time cost of having a business and starting a business is you're like developing all the templates and now you can like buy them.

I mean, there's like, you know, programs you can go through where they're like, we'll give you everything. We'll give you a standard operating procedures for everything. But I feel like that was a big investment for me in the beginning was just trying to figure out. Like really strong templates of like, when I bring someone, onboarding them into either a program.

And I think I did all that for coach training. I did all of that for slow hustle. So now I have these emails that it's like, this is, this is the kickoff email for this class and that class and this program and that program. And. Some of that you just have to work through, you know, and usually a couple iterations until you get to a place where it's working.

Do you have stuff like that, Sarah, where you've really templated it. And it's like when the client comes in, you ask them the same series of questions. Like you're, you're trying to kind of get the boundaries around what they're trying to do. Yeah. Um, I, I definitely have that for, uh, especially for virtual ensemble inquiries.

Um, so I have a, because apparently my SEO was really good on this particular product page. Um, I will often get. If people inquiring about having me produce a virtual ensemble for them. And so in the little form on my website, it's like how many people are in your ensemble? When do you want it by? And tell me anything else I should know about your group or whatever.

And so I get these emails that come in and then I can respond to them. I've got a sort of templated email that's like, thanks so much for your inquiry. For an ensemble of that size. I typically charge XYZ, you know, so I'm able to slot in that information pretty easily. It explains why I charge in a certain way and also ways to kind of reduce fees potentially, or, you know, go a different direction.

And then it's like, here, if you want to talk more, here's a link to my calendar. So that's really easy to respond to those inquiries. Um, in a way that makes sense. And then if they, if they do follow through great, like we have a conversation and kind of go from there. But, um, yeah, having that templated, like response to a common inquiry that I get was so helpful as has like made my life much, much easier, and I have several versions of it.

So I had. The like standard version of like, yes, I'd love to talk to you. And then the second one was like, unfortunately, my calendar is really filling up. Here's a bunch of people I'd recommend. Or, and then the third was, unfortunately my calendar is filling up, but I might be able to subcontract a contract with somebody else that I know.

So here's the, so like building a couple of different options so that I could kind of place in whatever I needed at any given time. It just, it saves time. It's, it's a huge time saver. Sure. Well, and I feel like also, and we're going to get into this, I think in a future episode, but. I feel like I figured out over time, what information I need to put on my website.

So that by the time they come into that exploration call with me, there's not like, like for example, people go back and forth about, should you put pricing on your website? I don't want to have to sell it in the exploration session. I want them to know what the cost is. I want them to have already thought if that cost can be fit into their budget.

Yup. It's not $25 to work with me. You know, like it's, it's often a decision that they have to talk to their partner about. They have to budget for, or they have to do get professional funds like through their institution. I talked to someone the other day that got permission from their provost to work with me, you know, like, so it's like, it is a, it is a process for people to release these kinds of funds from wherever they're coming out of.

And I want them to be able to think through that before we get on a call. And so, yeah, I put all that information. It's like, here's all the pricing. If you're doing this package, it's this, if you're doing, I never withhold that information. And I think that that kind of thing allows for me to close, you know, 90 to 95% of those calls, because by the time they get to, I mean, this is the other thing with coaching, and I don't know if I'd be curious or how this works in your area.

By the time someone reaches out to a coach they're ready. They've been thinking about it for a long time. So it's not done on a whim usually. I mean, it is like, and I had talked with someone last week who said, I've been following your work for a couple of years now. I really respect how you're doing XYZ.

Um, and I just finally had kind of the brain space to come talk with you. This happens to me a lot where people are like, they've been following my work for a long time. They've, they've wanted to rate for like the right time, you know, to sign up. But they know that I'm the right coach for them, you know, because they know my work and they've followed along.

So it's like the more I can put on the website, the more content marketing I do with the blog and the podcast where they can really get to know me by the time we get into that exploration session, it's a done deal, you know, like, it's really just, what, how, how do I sign up? What are my next steps? And so I'm curious how much of that is true for you.

I mean, because you've really been building out this new part of your business, have you been trying to lay out a lot of this on the website so that you can really close the deal more quickly? Yeah, I I've kind of experimented with this both ways. Interestingly, so, um, early on in the pandemic, I did actually have prices kind of quoted on my website and then I learned pretty quickly that like, Because each project is just different enough that if I said one thing on the website and then we'd have a conversation and then I'm like, well, it's actually going to cost more because here's what, like that kind of left a weird taste and weird conversation kind of thing.

And so I was like, okay, I'll take the pricing off. Um, and have people in inquire with me directly. And then I can, as I'm responding to that, Request. If they've given me the number of singers and a couple other details, I can more effectively craft a quote. And so for a lot of these clients, especially the initial ones coming in through, it might, um, the main forum on my, on my webpage.

It it's a lot of people looking for initial bids actually. So it's less that they know me from years ago and no. Exactly. All of that kind of stuff. It's more about, they did a search on Google for virtual ensembles and I pop up pretty highly, um, On the search SEO. Uh, and so they, they can look a little bit at some of my previous work is up there.

You know, my, my framing around like music is essential now more than ever, like, you know, I'm, I'm here to help people produce these videos. Right. So I I'm definitely selling on the page. Um, and, and I, I, it's definitely clear that it's going to cost. Something, but people are generally just kind of getting an inquiry of like, what would this cost me?

Here's my project turnaround, you know, would this be a good fit kind of thing, as opposed to, for sure this is going to be something. So, um, for me, it's the, it's that initial step where. I want to have, I don't want people to turn away from sticker shock right away in this context. And so I want them to do that next step of inquiring with me because then I can actually talk to them about like, here's why it costs this.

And here are the pieces that involved. And if we go this way, it can cost less. And if we go this way, it'll cost more and it gives more nuance than people are going to be willing to read on my webpage. I think in that context, So for me, it's been helpful to kind of have that extra layer of communication built into the inquiry process.

But, um, but then it does add more work for me on the back end. Yeah. Yeah. Well, I mean, with that kind of service, that makes sense to me, you know, I think that. The thing that always makes me crazy is when I'm looking to buy something and I have to give my email in order to find out how much it is, and I know I'm going on their list and whatever, whatever.

And it's like, it's not like your price is going to change because of who I am. The product is always the same price. You're just wanting my email to like, ah, whatever. Yeah. That kinda, I think drives me crazy. And so, but I think what you're describing is I need more information. Like I can't give you accurate information.

And with me, it's like, if somebody is like, well, my situation is pretty hairy. I'm not going to be like, well, I'm going to charge you more as a coach. It's like, no, everybody gets charged the same. If you want some kind of specialized package for like a team. Well then yeah, I got to like talk through that with you and figure out what we're going to do, but.

I think that it's different when you have what you're describing, which is very project-based and like there's nuances to that. So that makes sense to me. Well, and it's, it's tailored on each individual organization's needs too, right? Like I'm not going to charge an ensemble that comes to me with eight singers, the same that I'm going to charge an ensemble that comes to me with a hundred singers.

Right. Like, because the workload is totally different based on that. And so, yeah, it's easier for me to be like, Oh, eight singers. Oh, that's really quite simple. I can either. You know, subcontract that out, or I could, you know, do it really simply or whatever. And, and the, the level of. Like what kind of product or service is probably a better word?

What kind of service do they want to pay for it? Do you want to pay for just like a really simple edit? Like that's much lower than if you want really high quality, really fancy going to go in your giant event, whatever. So, because everybody's needs are so different right now and because everybody's budgets are so different, like I want to have the conversation.

Kind of individually with, with folks about that pricing, but I think it makes total sense for what you're saying, Katie of like, this is my process and this is everybody goes through the same process each time. And that doesn't change. Even if your particular situation is more hairy for whatever reason.

Like it, it, you know, my process is my process. So I think that makes a lot of sense. Is there anything Sarah, I know we've talked about in the past, this concept of outsourcing. Is there and you've talked about subcontracting. So you're, you're definitely starting to, I mean, I feel like we're going to come back in like two years and you're going to have this like massive company and I'll be like, well, it happened, but you know, like, I mean, you're, you're definitely growing out.

I think your expertise in terms of like collaboration's around projects and kind of thinking about that. Is there anything around collaboration or outsourcing that looks different for you now? And we've already talked about some of it, but if there are anything else you want to say about that from when you first started out.

Yeah. It's, it's been interesting, uh, kind of going down that road. Cause I didn't necessarily think I would initially, um, and even, even initially in the pandemic, but it got to a point pretty quickly where the demand was high enough and I didn't have enough hours in the day, but I also happen to know.

Other people who are either experienced audio engineer, folks, or people who are really good at video production or frankly, people who are like, this sounds like a really interesting skill I'd like to learn in my free time during the pandemic, like, you know, with, with the structure of somebody who knows what they're doing.

Right. So, because, you know, because I could provide some guidance and some, um, kind of skill development for a few, a few of those folks who were interested in doing that, like, I felt really confident in, you know, being able to kind of shepherd them along in the same kind of path that I would, uh, and, and sort of same structure that I typically do, uh, and to the same kind of quality level that I do for my productions.

And so, um, you know, it became a thing of like, well, I'd like to be able to serve these clients and I'd like to be able to, you know, obviously increase my client base and get my name out there a little bit more. Um, and so then it became a matter of, you know, figuring out who those people were and who was available to do how much and that kind of thing.

So it, it it's become a little bit of a like organizational, like, okay, so you're working on this project over here and you're working on this project over here. I've got this other inquiry that's come in. Do either of you have time for this? No. Okay. What about this third person over here? So it's kind of cobbling together, some of that, and, and I've only started kind of dipping my toe in that water in the fall.

Um, But as the pandemic drags on, it's like, okay, I could put together a full team of people to do this kind of work and really grow that direction. If I wanted to. I think for me, the hesitation there is that. That virtual acquires are not going to be a thing forever like this. This is not going to be a thing that people do.

Uh, when we go back to normal times, it's just not because it is the least preferred way of singing together. Um, so in some ways it's like, w why would I spend all of that time building that empire? When I know it's going to. Fizzle and die. So it's sort of, at this point, it's figuring out which clients fit best with both my philosophy, uh, for the, for doing this kind of work, as well as fit the schedules of the people I know I have available to me.

Um, and so if projects are interesting enough and if there's enough work to do, um, I think about like, Oh, okay, can I, you know, farm this part of the project over here and this part over here, and then maybe I. Take the final edit of putting it all together at the very end or, you know, I'm holding the primary relationship to the client and kind of doing some of the organizational and administrative kinds of stuff, but the editing is happening elsewhere, or, you know, I'm kind of playing with a few different ways of, of doing that.

And the other thing I've mentioned previously is working in partnerships. So I have a colleague of mine who is just very good at similar kinds of things that, that I have been working on and has his own skillset as well. But we, um, partner together very well. And so that collaboration allows us to kind of flex work back and forth and kind of subcontract with each other back and forth as needs arise.

So, um, yeah, it's been an exercise in collaboration and a little bit in management, although not. You know, management of, of people you're subcontracting is really different than managing like a team of your employees. So, you know, I feel like I'm kind of getting dipping my toe into that water. Um, but you know, for the most part for meeting the needs of, of what this time is, is making, you know, this time has made it so that.

I need to have a little bit more, um, capacity to bring other people on. I think this has worked really well and I'm, I'm kind of eager to kind of keep trying that out a little bit, but I don't know that I'm going to come back in a year and a half with a giant empire. I don't think we're there yet. Not that we can completely cross the possibility off the list, but

yeah. How about you, Katie? Have you been thinking at all about outsourcing and what does that look like for you? I know you've been kind of against it in the fast, so yeah, it's changed at all. Well, I mean, really what I've come to understand is I'm just a big, old control freak when it comes to my, my business.

I mean, I, I was talking with a friend the other day who, um, hired what is called an online business manager. So it's a little bit like a step higher than like a virtual assistant. And I was intrigued. I mean, I kind of looked into it and was like, okay, you know, maybe I would kind of think about this, but honestly, I feel like some of the stuff I would have to have someone else do it just exhausts me to even think about explaining it all and like getting them all set up.

And it's like, it's just, it's definitely one of those things where it's just easier for me to just do it. And that's the control freak part where it's just like, I hear it in myself. You know, it's like at some point, if you really care and you want to delegate, like you have to train someone to do that stuff.

And I feel like, um, I don't know, I haven't really given this like a ton of thought, but I feel like this is an area where it feels all or nothing. To me, it's like, if I'm going to hire someone, I want someone working for me, like a pretty significant amount of time. And I want to see them. And I maybe want to even have them like come to an office in my home and like be present with me, you know?

Like, I'm not sure I want to do like a 10 hours a week kind of situation or a four hours a week, you know, kind of situation. I would want to like nurture someone into being a member of a team and like really commit to doing that. And right now that's just not really what I want to do. So for a number of reasons, including COVID and just, you know, like, I, I feel like, um, I could see in the future, you know, maybe having something like that, but I also think that there is something about the business, the way that I'm running it.

And my partner and I have talked about this, that. It's important for me to be present in some of these things like the exploration calls. Like I don't want to hand that off to someone else talking about the coach training program. I want to talk about the coach training program, you know, like, and, and I just recorded a, a season of coach to coach, which is another podcast I do.

And I was interviewing people who are currently in the coach training program about kind of how they made the decision to take that step. And one person said, you know, Part of the reason I decided to do it is we had such a good exploration call and she's like, I just walked away from it feeling so good about the program and why you created it.

And like, I, and I was like, that's what happens when you put yourself? Into the business and you are sharing like from a very heartfelt place, like why you've created things and, and how you're trying to work with clients. So like, yeah. Is there a bunch of stuff on the admin side of like, you know, social media creation and, you know, things like that, podcasts editing that I could eventually see outsourcing?

Yeah. I mean, I, I think there's definitely a list of things there that eventually I might decide, you know, I want to do, but. For right now, I feel this way. I've always felt, which is like, it is easier for me in the day to day, especially when I'm juggling so much. And I don't have a lot of free time. It's just easier for me to use the systems that I've created.

That actually feel pretty good. I don't feel like I'm clunking along, you know, with my systems, I feel like I've created some that are, that are pretty good in terms of like bulk prepping things and, um, And, and making sure that I have time in my schedule to do what I want to do. Yeah. So I'm sure I'll listen back to this, you know, two years from now and be like, you should've done this way, way sooner than you did, and it'll be a whole situation.

And you know, it'll be like acuity when I was like, what was wrong with me that I didn't do acuity, but at the same time, you know, I, I feel like you make those kinds of decisions when you have the time and space to do it. And that's not right now. And it's certainly not in the middle of COVID. Right, right.

Yeah. Yeah. Yeah. And I think I need to have a better sense too, about, I mean, if I'm really honest and I've talked about, you know, the introvert piece before, I really just prefer to do a lot of this stuff myself, you know, like it's not that I don't like other people. I mean, obviously I have a ton of clients and like, I really enjoy that work, but.

Managing a person. Like I do it at work. I mean, I associate that with my job, you know? And so to try to do that on the side too, just feels like it's a lot. Um, yeah. So. Yeah, that makes total sense. Yeah. You know, I hadn't had this not gone the way that it has for me over the last couple of months, I wouldn't be subcontracting either.

Like there's not, you know, only when need necessitated it. Um, was that something I even considered? And then I was like, okay, is it going to be more work? Because to your point, Katie, like having to train people and having to, you know, bring them onto your systems and all of that kind of stuff. Like. That takes time and energy.

And so, you know, is that worth the payout in the end? Sometimes. Yes. Sometimes. No. And it's, it's a hard gamble. No. Yeah. And I feel like it is a Campbell and I feel like that's what I mean by like, if I'm going to invest in this, I'm going to hire someone and I'm going to like offer them benefits. Like I want them to stay.

If I'm going to pick someone to come into this business and they would be working with me, they'd be working with my partner, you know, like I would want to make sure. That we found someone who had the right skillset, who was a good fit. And then I was paying, you know, a decent amount to do what I needed them to do.

And there's a trade off there for me. I mean, I feel like this is the equivalent conversation that some people have that it's like, is it worth it for me to do childcare? When my entire income from my job goes to paying for childcare? Like, why not just have somebody stay home? I mean, it's like, I feel like it's kind of like that where it's like, if all of this income is going to supporting a person in a way that helps them to feel more loyal to me in the work and our clients.

Should I just be doing it myself, you know, like I that's, I feel like we're at that kind of point where it's like, I need, so I feel like it's one of those things where it's like, I made, they're not going to do it, or I'm going to be all in. I don't feel like there's an in between now. I will say, I know there's a lot of people who will disagree with that and who feel like in order to grow a business, you know, you have to hire and you have to do all these other things.

And, um, You know, we've doubled our revenue every year and I'm not hiring anyone. So I, you know, I'm doing and in my way and doing it my way, darn it my way, make your way. That is, that is the whole point we're talking about. So I just, you know, I think it'll be something that there's just so many things that when you turn your, I think about like this year in particular and where our time and attention had to go, you know, handling, COVID coping with all these other things that we've been dealing with.

This has not been a priority for me to be thinking about, and maybe in a year in the future, it will be. But for right now, I just think I don't need to worry about it. Yeah. Yeah. Well, anything else, other words of wisdom around project management and any of that kind of, kind of thing as we wrap up, or I think I would just echo, because I talk about this with so many of my clients, how important it is to personalize these things.

And because people will just be like, tell me your ways, you know? And I'm like, Oh no, no, that's I have carved out my little niche here of what works for me. And maybe it works for you too. Like, I will tell you everything. I mean, listen to my podcast, I will tell you everything I'm doing, but I feel like it's important for people to understand that like the systems that you create for yourself are personalized to your personality, to your strengths, your weaknesses.

And I help people to do that. I mean, I help them to find the right path. But I think it's important when you're thinking about this stuff and this is why it kind of bugs me when there's online business owners who are like, I will give you my whole system and I'm like, I get it. And also that may just not be the system that works for you.

And I feel like they're kind of selling a, uh, I don't know a false sense of how it's going to work, because I just, I know enough about systems to know that you have to really. Pick one that works for you. And I know people who love Trello and who love Isana and who love notion. And that's because it works for them.

There's something on a base level that is like connecting with their preferences. So I hope that people are taking that away because obviously you and I are doing this really differently and we have different preferences. We have different tools that we're using, and we're still finding our way, you know, in terms of doing it in ways that work for us.

Yep. Yeah. Agreed. I don't have more to add. Well, after, you know, five hours of podcasting, I don't know there is to say Sarah, I'm just proud of us. That that was pretty coherent. I think I, hopefully it was wait. I hope you thought so too. I hope think we're maintaining our coherence and we are now going to take an official.

Break from recording, uh, at our next three episodes will be in our next big session. Um, but look for upcoming episodes on, uh, talking about the retrospectives of online presence and brand evolution. We're also going to talk about marketing and sales and how that's really shifted for us over time. And then we're going to end the season talking about our biggest business fears, what we used to be afraid of, what we're afraid of now, and, um, should be a good, yeah.

Yeah. I'm like excited and trepidatious and a little bit scared. It's fun. That's how you know, it's good. That's how, you know, I mean, you know, that's pretty much life as a business owner. A little bit content. Yeah. A little bit of scary. I mean, that's maybe your biggest business fear. What we talk about on the podcast.

There you go. All right, Sarah, until next time. So good to talk to you. Okay,

thanks for listening to this episode of make your way show notes and a transcript for this episode can be found at Dr. Katie linder.com backslash M Y w. If you found this episode helpful, please consider rating or reviewing the show in Apple podcasts. Thanks for listening.