**final - S7E7**

to make your way, season seven, episode seven. Welcome to make your way where we explore what it means to work and create on your own terms. Along with every episode we post links to resources mentioned in the episode, along with the full transcript, you can find these materials at Dr. Katie linder.com.

Backslash M Y w. Hello, Sarah. Hello, Katie. How's it going well, since we talked about an hour ago and okay. Energy feeling good for this episode, which is all about sales and marketing and. I want to start out Sarah, because several seasons ago we did a, I kind of cajoled you into doing a full season on marketing and sales, because you were like, I hate this.

I don't want to do this like this. And I was like, let's just do a deeper dive, like for both of our sakes to try to feel like we can understand this and, and better, you know, how have the knowledge we need to kind of make these decisions. And I'm just curious how you feel generally about this concept of marketing and sales, because back then with that season, You did not have a great relationship with us.

Like this was not something that you enjoy doing. It was not something that you looked forward to doing. And not that many of us, you know, enjoy it, but I think that you seem to be kind of more negatively associated with it than I was. Um, so how do you split it up? Oh yeah. Um, uh, you know, I think, I, I think in general, the answer to that is I still react to the terminology.

But I also understand how I do marketing and sales better now. Um, and I feel much less pressure around how you're supposed to do it. And I see now more in my, in my business, how. How marketing happens, how sales happens, and it feels much less contrived, um, and much more authentic and in line with who I am and what I want to be doing.

So it feels more comfortable and much more a part of like, yep, this is what happens. Um, as opposed to like, well, you have to use the marketing tactics to get the people, to buy the thing. And then, but how do I price the thing? And what's the thing, you know, it ended up, you know, listeners from that season will remember many, many.

I don't know what I'm doing, guys. Okay. Was a lot of consternation that season. There was, there was, I kind of hated it and there's still parts of that. That I'm like, like, it doesn't resonate with me. It doesn't serve me, you know, certain tactics or, or ways of approaching marketing and sales that I'm still just not gonna ever use.

And, you know, that's just part of figuring out who I am as a, as a professional and what, what I want to offer and how I want to offer it. So, um, you know, I think. Where I am now is thinking much more about marketing and sales as a part of the business and not separate from it. Like it's, it's integrated in a way.

That I guess I, I hadn't really considered before. Um, and we've talked about this a little bit, Katie in the season that a lot of the business stuff is coming from word of mouth now for both of us. Um, and so I consider that my biggest marketing tool, frankly, is people having a great experience with me like that is, that is the marketing strategy, making sure people have a great experience.

Get a quality product that they want, um, you know, get the answers to their questions and feel, you know, seen and heard and appreciated. Um, you know, that's, that's the marketing strategy, which sounds maybe overly simplistic. Um, or we can talk more about that obviously, but, um, I kind of took the pressure off myself to try to do all of the different things, uh, because it was just, it felt like spinning my wheels.

And so shifting that perspective a little bit and, and really settling into. My business and feeling like what I'm offering has value in, and I'm really helping clients figure out what they need to figure out and take their work to the next level. Like that helps me settle into, Oh yeah. I have a thing that people want and that I can sell that.

And that's great, you know? So I think some of that just comes with maturity of the business and, and kind of settling in a little bit more. Um, so yeah, I I've shifted, but also not, I guess it's where I am on marketing and sales. I'm curious if you could talk a little bit more, like you said, you know, I was here and now I'm here and you gave a couple examples of like, what has.

Like the maturity of the business and like word of mouth. Are there other things that you feel like helped you to settle into that space when it came to marketing and sales in particular? Because I'm sure some people listening are like, yeah, I would like to progress past this icky phase. It all feels Vicky and I don't.

And you would use these like hand motions too, that I'm sure people are flailing, um, that I'm sure some people are feeling. I mean, is there anything that you felt like has been particularly helpful for you to transition toward where you are now? I think there are a couple of things, um, and some of them are, are specific and some of them are kind of a little more, a morphous and hard, hard to like wrap your arms around.

But, um, for me, the, the comfort. That came from knowing I've done a job well done. And, and I, I know that the client is happy and I know that I helped them take their work to a place they never could have done on their own. Um, for, uh, for a service focused, you know, business. I think there's a certain level of kind of clarity and, um, uh, boost that comes from that, that.

That you know, that you were the one that helped them achieve whatever it was that they needed to achieve. And, and that feels like a thing that not only builds your confidence, but that also helps you kind of wrap your hands around. Like, what is it that I'm offering? Um, what I am offering is this very particular experience or I'm offering this very particular, um, answer to this kind of this problem, or, um, it can just help kind of bring all of that into focus a little in an, in a way that you feel more confident, kind of stepping forward and saying, this is what I offer, and this is how I do this.

Um, So that's, that's a little, maybe a morphous, but it it's, um, that certainly, I think helped me feel more confident about kind of putting out there. This is what I do and how I do it. Um, in terms of some of the tactical side of things. Um, I remember, I remember a whole episode where we were talking about testimonials very strongly, that testimonials, I still don't love them.

Um, I. I heard you use that episode by the way to talk about this. And so hustle where I'm like, I feel differently about this. Some people are completely skeptical and will never use these worthy and you can listen to this episode and then there's other people who are willing and, you know, like, I think it's actually a really great conversation because.

We felt really differently about that. And it's another excellent example of how you can go totally two opposite directions. You'll still be fine, you know? Yeah. Yeah. And I will say that I've started being a little more intentional about collecting those and not that I always use them, but it's nice to have it.

So after I work with a client, I will often say if it was a really good experience, um, in generally for me and for the client, I will ask them, you know, can you reflect a little bit on. Uh, you know, if you're willing, could you share a couple of lines about what, what it was like working with me because it's helpful for other people like you, uh, to, to kind of know what they're getting into when they start working with me, you know, something like that.

So I have some of those, I've put a couple on, uh, on my website. I don't have any. Sense as to whether that's what sells it for people like, frankly, I think what sells it more is that client talking to another client, you know, another person who's having the same problem being like, Oh, we worked with Sarah and she was great.

And here's, you know, so to me, it's. Uh, testimonials still feel like a contrived word of mouth to me. Uh, but that's not to say that I don't use them at all. Um, and I have started collecting them a little bit. So like that's a tactic that I've moved a little bit on, but it's still not one that I rely on heavily.

Um, In the last episode, we talked about how social media is not a thing that I do anymore. So that used to be, you know, a more prevalent focus of my, of my marketing and, and, you know, sales strategy. But I think one of the other things that I'm thinking about more actively now, as things are kind of shifting, and as, as I'm kind of continuing to grow.

In this newer direction is how does the work either that I've done previously or how are things that I'm making now going to serve the next step? So it's thinking iteratively. Um, there are some clients that I'm working with now that I think about like, Oh, this piece of this would be really helpful for other people.

So how am I going to take this and package it? In a different way and offer it in a different way for people. Um, one of the, the, um, and working with a team of people, helping smaller arts organizations in Minnesota, think about their presence in digital spaces. So how do you sell your art? How do you present yourself in online spaces?

How do you make videos? How do you do virtual events, all of those kinds of things. And so, as a part of that, we were building an online teaching package, basically with the idea that. You know, we're going to take this group through this because that's the project that we've been con you know, um, kind of consulted with to do.

And then we're going to say, Hey, we built this thing. Now we can sell it. So it's thinking about what's the next experience that you're going to offer for clients that are like the clients you have now and thinking about what's the next experience you're going to offer for the clients that you do have now who you want to take deeper.

So I think that's kind of how I'm thinking about marketing and sales. It's more about like, Working with the people I'm working with now more, or it's working with people who are very like the, the clients that I have now and how do I better serve that, that type of client the next time. Um, and making that clear and available and, and, um, present in, in the way that I talk to potential clients and the way that I present myself online, all of those kinds of things.

So. I don't know if that really answers the question in a way that the listeners can be like, Oh, I can do that in my business. But, you know, I think thinking iteratively and, um, you know, building that confidence are kind of the two things that have most kind of clarified marketing and sales for me, but.

Yeah, I'm curious. I have a follow-up question. All right. All right.

my follow up question. I'm happy to answer all these questions too, but I was thinking about, so we think about marketing and we say marketing and sales. They're two different things. And I know now you are probably doing some kind of intake system for your sales or some kind of like exploration call with clients to like, make sure this is the right fit.

I do this too, you know, with coaching. I'm wondering if you can talk about how that has shifted from the beginning, like when you're doing the direct pitch or when you're like talking with someone before they've hired you, because this is an area that I think it's so easy in the beginning to feel like weird about it, or like, to not feel like you have your schpeel, like perfected, like how is that for you now?

Especially since you've recently shifted into more of this video production work. Yeah, it's, it's interesting. Cause I get a couple of different kinds of inquiries, um, because I am kind of one of the handful of people who does the virtual choir, especially in virtual ensemble work, um, you know, kind of.

Hmm, that that comes up on Google search when you search for those things. Um, I will sometimes get cold inquiries about like, can you just give me a price quote for what this would cost? So those are really easy, cause I've got a template response. Um, the way it works on my website is that people enter their information to new contact form.

And I asked them a couple of questions about like how many. Singers or ensemble players are going to be in this project, you know, when do you need it by some of those kinds of things? Cause then I can, I can, um, better address the quote question. Um, so I'll get a lot of those and I have kind of a template that I say, okay, well typically for this kind of project, here's what I charge.

Here's why, you know, here are the things that go into my base price. You know, if you're interested in talking more, let me know, and we can set up a time to chat or sometimes I'll just put, provide a link to my calendar for people to sign up. Um, So we can talk more. Um, so there's, there's that, that's kind of like the.

Cold quote, email. And then I also have a couple of places on my website where I advertise a free one hour consultation with me to talk about, you know, your event or your video production needs or, or whatever it is. And so for those, those are a lot more nuances. And it really just depends. Um, a lot of those that I've been getting recently have been around virtual events.

So a lot of groups were of holding fundraisers and other kinds of online experiences. And don't really know how to do the streaming with, you know, existing video and bringing on special guests and all of that kind of stuff. And. And so for those conversations, the way that I frame those is usually we set up a time, a time to chat, and I just sort of ask a lot of questions and, you know, try to get to the bottom of like, what is this client really wanting to do?

And then it's a matter of providing them a lot of value. And for me, that honestly just looks like answering the questions they have and providing them with a bunch of creative ideas. So. If, if somebody, when they're in a call with me, you know, gets five different ideas for how they could do their virtual event.

And I answered the questions about the tech stuff and, you know, basically I'm like kind of an open book in that hour. I feel like that makes the case for me in some ways where it's like, Oh, this person knows what she's talking about. And, and she can actually do what we need a person to do. Now. Sometimes all they need is that information.

And then they go figure it out, how to do it themselves. And that's totally fine. But a lot of cases in a lot of cases, um, I very, usually pretty quickly get a, uh, a follow up email or something that's like, this was so great. We'd love to work with you. Right. And that's when I know that the personalities clicked.

Right. And that what I was sharing was really valuable to them. And then I know like, this is the kind of client relationship that's going to work really well, both ways. So, um, yeah, there's a couple of different pieces of that, but I think, um, In those conversations, I'm always focused on getting really excited about whatever it is they're trying to do.

Um, and letting that energy and those ideas kind of, um, you know, talk with letting, letting those ideas and energy communicate with the client about. My excitement for them and for what they're trying to accomplish. Um, and that usually does a pretty good job of, of helping convince people that they, that they want to continue to work with me.

And the project scope might shift a little bit based on pricing and budget and all of those kinds of considerations. But, um, you know, if I channel my excitement and my energy in a productive way, I usually find that people connect with that in those, in those individual calls. okay. Interesting. Yeah. So, Katie, I know that you have felt really.

Differently about marketing and sales than I have kind of all the way along, which has always been a fun, fun conversation that we've had a couple of times now about, about this. So I'm, I'm curious, kind of where you are now in terms of thinking about marketing and sales, um, and sort of any reflections you have on, are we more aligned than we've ever been or are we diverging differently?

Again, drama, drama. I feel like we're probably pretty aligned here. Um, And I've always appreciated your kind of critical questions about this. I feel like my approach when I feel like I don't know something, but I feel like I really need to know that thing to be successful. I will just take it head on. I mean, it's like, I, I don't avoid that thing.

I don't. Procrastinate, you know, like it's like, no, this is, I need to know this information. And so whether I like it or not, I'm going in this direction. And I even felt this way when I had to begin kind of doing my yoga teaching as part of my training, I was like, I don't feel ready to teach yoga to people.

I don't feel like I have the tech set up to do it. I don't feel like I have the kind of proficiency and understanding of how to do this with. Queuing and all, but I was like, if I don't jump in, this is how I'm going to learn it. Like I have to just do it. And so, you know, I'm almost at 50 hours of teaching now and I feel more comfortable.

I certainly don't feel like I all know what I'm doing all the time, but I feel this way about a lot of things. And so I think that this is another really good example of that, where it was like, there was when we did that season, you know, I think it was like season three. I was like, I don't feel like I know enough about this.

And clearly it's like a cornerstone of, of having a business so that you have to market and sell things. So let's just like hit it head on and like try to figure out what to do. And so I think it helped me to do some reading about it and to try to get into even like a money mindset about understanding value exchange and you know, what, what is the value that I'm exchanging for things.

I feel like it's becomes so much easier over time. Like I just, and we've talked about this earlier in the season that we don't question our numbers as much. We know what our, our services and products are worth. Um, and there's some work that goes into that in terms of just, you know, getting, getting your head right about that.

But I think that I probably came into this a little easier than you did. And just that I, I was like, this is like a necessary evil, so like let's just figure it out. Um, and I, I think I was open to this concept of. That value exchange of, you know, like money is just one form of value, you know, and what I'm giving to people.

In some cases they would describe it as life-changing. So what is that worth to people to kind of come out on the other side and feel like they can make a big decision or they can move forward with a massive goal or whatever it is that they're trying to work on. So that's an important piece of it to me is like understanding the value.

The other thing I would say is I feel like I've come to a better understanding kind of like you described Sarah of the stuff that I really like when it comes to marketing and sales. And for example, content marketing is totally my jam, like podcasting blogging, and then like using that to drop in the kinds of stuff that I'm working on, what I'm thinking about.

The next direction for the business. That was totally how I integrated the yoga stuff. I mean, like, it's, it's so easy for me to do that and because I produce a decent amount of content on a consistent basis, there's always a way for me to talk about things in a pretty natural way. And so that feels really good to have kind of figured that out.

And I feel like I, in the beginning probably treated content marketing. A little too, like preciously, like it had to be planned and it had to be scheduled and now I'm just like pretty random about it and it's working fine and that's fine. Um, the other piece I would say that I feel like I've gotten pretty comfortable with is the exploration calls, which is why I wanted to kind of check in with you about that because.

The more I've worked with clients and I just have answers to all of their questions. I mean, we've all been in situations where we're asked a question and we don't have the answer and it's just like, wow, like it's, it's not the best. But at this point, you know, if somebody asks about pricing, I can answer that question.

If somebody asks about results, I can answer that question. If somebody asks about my process, I can answer that question. Like anything that they are going to ask about. I'm I'm nearing a thousand hours of coaching at this point. So I just feel very comfortable about, you know, if you want to work with me great.

If this isn't the fit for you, great. Like it's totally fine. Happy to recommend other resources or people that I think would be a better fit. Like I am way more interested. And I remember talking about this however long ago. So at some point in one of our seasons about I'm way more interested in helping someone solve their problem.

Whether that's with me or not, that feels good to me to, to help them move forward with an area that feels challenging. So I do feel like exploration sessions are really about that. It's helping me understand, you know, can I help them or not? And then if they decide, you know, they want to take. Take me up on that they can.

So, and then the other piece of that, that I think kind of gets layered in is when I do basically vetting calls for the programs and get to know people and see if it's a good fit for them, that really helps me to, to curate the community that I'm building and make sure that it's not just me, that is providing the strength of the experience.

It's the whole cohort. That is coming through coach training or that's coming through so hustle or that's coming through a writing group. Like it really does help me to, to know that they're going to have a community of people supporting them. So that's, that's something that I think has shifted and I is about selling because that's part of what I'm now pitching to people is that you get this incredible community of colleagues that I'm like personally vetting for these programs.

And. I would imagine that gives people some level of trust that I'm not just letting anyone in. And I don't mean it. I can even hear what I'm saying that like, I don't mean to be exclusionary, but I do mean to, for example, I had somebody contact me several months ago about the coach training program and she was coming out of K12 and she's like, is this a program for K-12?

And I was like, honestly, no. It's not, I did not design it for that. K12 has its own stuff that they deal with around coaching. There's actually a ton of literature around coaching and K-12, that has been around for a while that does not exist in the higher ed space. So I was like, I'm not sure this is the right program for you.

Like if you're really looking to coach in the K-12 environment. Here's a bunch of resources. And I gave her like a list of books and, you know, other things to look into, but I said, we're not going to focus on that here. So you're going to have to do all the translation, work yourself. If you want to come through this program.

I didn't say no, but I also just was very clear that the program is not designed for that. So I think that that's the piece that is useful is. My own clarity about what I do and what I don't do, what I do well, what maybe I don't do well. And then communicating that out and being very honest with people when they come to me for surfaces to say like, yeah, I don't really specialize in that area.

But here's another person who does, um, and maybe it would be better support for you. Yeah. I think that's a great point, Katie, that, that we don't have to be all things to all people. And if you don't have the right answer for the person that you're talking to. That's okay. But referencing other people who might, or who might be a good, a good fit for people.

I did a lot of that, uh, in the fall with, with virtual ensembles because people were just clamoring for that service. And I got to the point where I was like, I can't take on anymore. I don't have any more capacity. And so I had a list of resources. I was like, here's some do it yourself stuff. And also here are other people I know who do this work, who might be a better fit for you, who might be a good place to look.

And people were super grateful to, you know, not just get the, the, I'm sorry, I can't take your work right now, but also to get a list, you know, six to 10 resources that they could look into. Um, I got a lot of responses from that being like, thank you so much. I really appreciate it. Like. That's really great.

So going that extra step of when you don't have the answer, finding the people who do, uh, or who might have the answer for this particular person, I think that's a huge, a huge, good tip for people who are kind of getting into this, um, this idea of like, how do you have those calls and how do you have those conversations?

Katie, there were three things. That kind of came up, bubbled up for me. Uh, when you were talking, let's see if I can remember all three of them. Uh, I was going to say

I'm literally, I'm holding up three fingers because I was literally like, okay, I've got three things and I was like, good to keep the fingers out until I remember them. Um, anyway, the couple of things that come to mind, um, The sense of confidence that is so important, uh, that we both kind of talked a little bit about, um, Desperation talk a little bit about desperation and then the third was fit.

So Katie, what you were just describing, um, is this idea of fit and kind of curating an experience for people. Um, that part of what you're selling is that curated experience. And so that fit piece is really, really important. Um, I think for my work fit is also really important, although it's a little bit different because it's a.

You know, it's, it's kind of a, more of a transactional relationship for some, for, in some cases, at least like I'm presenting a very specific service, but for a lot of clients that I work with, and if I'm going to be delving into a more deep relationship with them, I want to know that that fit is going to work.

Right. And that, that we're going to be able to communicate well that we're going to be able to kind of we're on the same page about things, you know, the expectations are the same and that sort of thing. So. For me fit is definitely one of those things that I'm really weighing, um, in those initial calls, the desperation and confidence thing.

We've talked about this before, right? Yeah. Uh, w yeah, we've talked about this before a bit, but the idea of when you're, when you're thinking about sales, Coming at it from a place of confidence that you're the person to solve the problem while also not being so desperate for their business, that you exude this sense of desperation.

Right? We've talked about this within the context of, of social media. I think more than anything else, but people can sniff desperation out a mile away and it is not. It's not an endearing quality, um, especially, you know, especially in a business context, like, okay, I'm going to trust you with my business.

That you've just, you're really, really giving me that energy that I'm not super crazy about. But if you turn that around a little bit and you come at it with, with. Um, not a nonchalance, but a little bit of like, yup. I'm the person who can solve your problem. And, you know, I know that I am qualified for this.

I know that I am uniquely suited to meet your needs in some way that has a magnetism and an attraction quality. Um, and people talk about this in the context of relationships, too, right? Like people are attracted to confidence. And so figuring out how to get to that place of confidence. While also not being desperate.

I don't know. Katie, tell me your thoughts on this dynamic. No, this is huge because I think about this reminded me. And I've talked about this before on the show. I think of somebody that I hired at one point and she wanted to have an exploration call and I was like, sure, happy to have an exploration call.

How much is your service? I need to have a sense just for my own budget of, cause I was pretty sure I was going to hire this person. And she didn't want to tell me over email and she kept pushing back and I was like, look, I'm not going to have a call with you until I know what you're charging. Like I did.

I was very direct and I'm like, I'm interested in the service, but I need to know how much it is. And part of it, I think she wanted to suss out what exactly I needed. And like, if it, you know, kind of like you're doing, you know, but at the same time, I was like, I need a ballpark. Like, and I understand what you're doing.

And I understand you're trying to get me on the call so that you can sell me the service. I get it. I'm a business owner. Like I'm not completely naive. You are making me crazy by not giving me this information. And it does not endear me to you that you're not doing this. And so I feel like there's, for me, the sense of like, there is a transaction involved.

It's okay to treat it. Even though there's a relationship that's being built there. It is also a transactional relationship. That's the value exchange. So when somebody emails me and they're like, Hey, what's the price for X, Y, Z. First of all, all the prices are on my website. So there's nothing that I hold back in terms of pricing.

Um, but I will explain it. I'll just like break it down and I'll say here, there's a couple different payment options. Here's what it is. Okay. It's just information. Like, I don't care if it's the right sales technique or not. I don't care if it's better. If I get them on the call and whatever, whatever for me, it's like you meet the client where they are.

And if the client wants information, you give the client information. There were a couple of people this past year for slow hustle. We went through like six or seven rounds of emails. They had tons of questions. They really wanted to make sure it was the right fit for them. We had the Q and a call and then they just kept coming back.

And I was like, this is where they are, where they're like, not sure what they want to do. And I even said at one point, like if you have this many questions, I'm not sure this is the right direction for you. You know? Like, and it wasn't an ultimatum. It was just like, I want you to make the right choice. And if you're really questioning it as much, maybe this isn't it.

Maybe the timing is not right for this. So I think that part of it, you know, to get back to the piece about desperation is I'm focused on the client. I'm not focused on my techniques for sales above the client. So that's my number one, which is like, Tell me what you need. And like, let's try to figure out what you need.

We also talked about way early or way earlier in the season about kind of the full-time versus part-time work that I have the privilege of doing that because I have a full-time job and that I am not, you know, super laser focused on making numbers, you know, and, and if we have a bad month or whatever, it's fine.

I will say though. I, I care pretty deeply about our revenue numbers. Like I'm looking at them every month, every week, you know, like I have projections, I have goals. So, you know, it's not as if that's not on my mind at all, but I also know that reputation is so important. And as soon as I start going down that pathway, Word spreads, you know, and then you have people out there doing word of mouth.

It's not positive about what you're doing. And you know, like there's just this like ripple effect. I think that happens when you start to bring in people who are not your ideal clients. And it's not to say that I never make a mistake about that. There have been a couple situations where I got kind of caught up in.

Well, they want a 12 session package. So like, yeah, I'm gonna make this work. And then I got into it and I'm like, I shouldn't have done this, but you know, it's a learning experience. Every time I figure it out more, every time I have a better self-awareness of like what got me into that jam and part of it too.

And I talk about this a lot with coach training, I act differently when I'm tired. Like bottom line. I don't coach as well. When I'm tired, I don't do these exploration. Like I'm just not on my game. I think everyone can understand that of like, when you're tired and you have a bad night's sleep or a bad day or whatever, you're not going to bring your full self to these kinds of situations.

And so, I mean, that's the other piece I think about is like, I think I have the moments of desperation when I'm tired or when I'm anxious or, you know, like when I'm, I'm just not in my best. Mode of being. And so that gets me thinking about a much bigger picture, which is how do I stay in my best mode of being I sleep a lot.

I eat, well, I exercise, I do the yoga. Like I, I'm trying to be the best version of myself because by bringing the best version of myself to my clients, I'm less likely to get into these modes of, you know, desperation or taking on things that I don't want to do. So. There's a lot of values alignment there, which again, we also talked about earlier in the season of just like really trying to stay true and centered to what do I care about?

What am I representing here? Um, so I don't know if that helps at all. I'm curious kind of what your reactions are to some of that. Yeah. Well, I think, I think you're spot on with the, the values alignment piece and just sort of, um, Knowing and, and settling into, uh, who you want to be in your work and, and what you want to bring to your work.

Um, and how does that align with. Um, how you do your work. Right. And, and I think that that sort of obviously transcends marketing and sales, but, um, one thing that I wonder about Katie for you, cause I wrestled with this a lot, um, right now and again, super privileged position to be in, but I have frankly, more work and inquiries coming in, then I know that I can handle.

Right. And so how do you build out sort of. You know, knowing when you have to start saying no to stuff, even if the project is cool. And even if, you know, you could help the person and even if you know, right. Like how do you sort of curate those boundaries and also like build in a little bit of buffer time for that one cool passion project that might come in, um, Or that one client that you're like, no, but I have to take this with this gig.

Right? Yeah. Sort of that, that question about capacity and extending yourself too far or that, or whatever. Um, I'm, I'm curious how you find that balance. Um, you know, you talked about kind of keeping, keeping your self care kind of stuff at the center. But have you ever run into a situation where you're like, I'm pretty much at capacity, but also I really want to do this other thing I know you have.

Yeah. How do you do a hundred percent the wrong person to ask this question too? You're as you're talking, I'm just smiling to myself, going to like, okay. Yeah. Okay. Way to like poke at my Achilles heel. Uh, yeah, same. I suck at this. I mean, I'll just say it I'm really bad at this. Um, and part of it is, and it's actually a conversation I've been having with my partner for a while.

Like we've been trying to figure out what is the capacity and. I think that the, like, this is the excuse I give myself, I'm not sure it's fully justified, but like, this is part of the excuse. I give myself, I work with a lot of clients that don't schedule me regularly. So they don't have like a standing weekly session with me.

They have like a session every three ish weeks and they kind of book it when they want to. And it's not all booked out in advance. And so, yeah. I don't really know, you know, like when I'm full up, I guess is the, the point now I will say there was a week or two in January where I opened up additional slots that I wouldn't normally give, because I was like, there, there is no way to, for people to book me, like during this two week period, I was just completely full.

So that was a signal where I was like, okay, so I'm starting to get a little jam packed here. And, but part of it is. Two two nights a week. And what two, one, two hour slot on the weekends are taken up by coach training. And depending on where I am in coach training, everybody within certain classes gets two observations with me that they book during my coaching slots.

So once we get past a certain point in coach training, where people are scheduling observations, which are also random, they're not like you have to do it during this week, or you have to do it during this period. It gets a little hard for me to juggle of like, what is actually full in my calendar and what it's not, because I can't really project out and I don't want to say no to someone if I could kind of slot them in.

So that's what I tell myself is, you know, and I realized that could be a bit of an excuse, but that's, my challenge is because I don't have like regimented. Use it or lose it policies kind of thing for coaching. Like, I don't even tell people, like you have to use this within a year. Like it's very flexible.

The other part of that, that's a bit challenging that I'm actually just realizing this week, this came up is I have people who rap and I can't plan for that either because sometimes they don't tell me they're re-upping for another package until like one session before they're about to be done. And then they're like, Oh, I want three more sessions or, Oh, I want another succession package.

So that's the other piece is it's, it's not really, like, I have a certain amount of clients and I like rotate one out and I rotate another one in it's more like a very natural, I don't know, like rhythms of my schedule. And I kind of look out on my calendar and if I'm like really booked out for a long time, then if somebody comes into an exploration session, I might say, I'm currently not booking.

And for like three more weeks and you can look at my calendar. And so if you have like an urgent need to start this, like right now, I'm not going to be able to work with you. Like, so I do do that. Um, I will say I've turned down a lot of projects in the last year. Part of it was because of COVID. Part of it was because I didn't have interest.

I've been pitched to do like three books or edited collections by publishers. Um, probably more than that, that I'm just not thinking about. And I was like, Nope, not in the mode, not interested in doing that. Um, and even most recently, and I haven't really talked about this publicly yet. I've been working with this book coach, which I have talked about publicly, but we had a conversation the other day where I was like, this is energy draining me right now.

It's not energy giving to me right now. And so I need to pull back. Like, I was just like, I can't do this and everything else that's going on in my life. So I'm interested in this project and I know it needs to move forward, but it might be like a 20, 22 project and not a 20, 21 project. So I feel like the, my Achilles heel is clients, because if somebody wants to coach with me and they've taken the step to come to the exploration session, I want to make it work as best I can.

But like these other projects. It's relatively easy for me now to be like, no, I don't want to give my time and attention to that. And I also, I've just blocked out time. Ahead of time for a lot of this stuff. Like the coach training, like I know all the courses that are happening this year, so I, that helps me with calendar management.

Um, but the last thing I'll say, cause I feel like I'm kind of rambling about this is I have, uh, in the past few weeks, Blocked out time on my calendar for rest. Like I I've just taken afternoons. And even before we started recording today, I told Sarah that I had planned to edit some of these episodes this afternoon.

And I just moved that cause I was like, I need to rest. And I'm feeling a little burnt right now. And so I've just like made time basically for that. So that, that client piece is definitely my Achilles heel, but a lot of the other stuff, I feel like I'm able to juggle pretty, pretty easily. What, what are you thinking, Sarah?

Like, what's your reaction to that? And how does it compare to your experience? Yeah, I think Katie, what I'm hearing from you is, is something that resonates with me, which is that you've you figure out where your limits are and where your boundaries are and how to make the things that you want to make work, work, and how you say no to the things that.

Are less important. Um, and I think some of that is just the maturity of the business. You know, we've kind of talked about that a lot this season that like we're in a really different place than we were a couple of years ago when we were first starting out. And so, you know, I think it's natural, right.

That we've kind of figured out some of that. Um, but yeah, I think it's, it's also a struggle for me to figure out what is the balance, especially because a lot of the projects I'm doing are so. Like each one is different. Like there are similar kinds of projects, but each one is different and has its own needs.

So like some clients. I sense pretty early on like, okay, there's going to be a lot of front end communication related here because w you know, they're just not quite sure about some things. So they're going to need some consulting on how to get to the answers, to the questions that need to happen before we can do this, you know, this next step in the process.

Whereas other clients are like, okay, I know exactly what I want. Here are the things I need from you. Let's go, you know? And so each client is a little bit different. Um, And sometimes that's hard to tell in the first initial, you know, consultation call, right. It's, it's a little like, okay, I think this is going to be fine, but then things come up later, which ended up eating up more of your time.

And so like, they're kind of hard to predict that way. Um, and so I try to price for that. Right. I try to build that into my pricing scheme a little bit, but, um, You know, in terms of calendar like this spring, I I've done a dumb, I'm going to admit it. I did a dumb, um, I have in March, I have, uh, For four events in two weekends, I did a dumb, it's going to be no, I've heard that phrase before.

So every time you say it, I'm like, this is so interesting. I feel like this is like a regional, I did a dumb, yeah, I don't know. Did I pick it up on the internet? I don't know. Um, but uh, yeah, so, so I have, you know, a bit of a scheduling crunch and I know that that's coming. And so I'm trying to build in.

Things now that I know need to happen in order for the next things to happen, et cetera, et cetera. So for me, the stress really comes in or the pressure really comes in because I want to do great work for the clients that I have obviously. Um, and when I start to feel like my time is so limited that the quality of the work is going to have to, you know, be adjusted a little bit, even though it's still going to be totally.

Acceptable quality work. My type a perfectionist is like, but it's not as good as it could be. So, so that's where I, when I really start to feel that tension is like, am I having to compromise, uh, the quality of my work? For, you know, have it know in order to take on a different project. And that's, that's where, when I started bumping up against that, that's when I really started to have to reevaluate.

Okay. Can I really take on this other project? The other thing I will say is that I've. Kind of expanded a little bit, um, in the sort of outsourcing realm. So I have people that I work with either very collaboratively or who I hire to do certain parts of certain projects that I know I can trust to, to take care of those things.

So I'm able to take on more in some ways, because I'm able to do that, but there's still a level of like monitoring and making sure the project is happening and communication and all of those sorts of things that still have to happen. And so for me, it's really this like, Kind of a morphous calculation, guesstimate kind of approach of like, I think I can take on another project, but, uh, yeah, it's, it's staying core, uh, you know, staying true to those values and making time for things like rest.

Um, you know, I'm, I'm already looking at my calendar for the next month or so and going, huh? So, when am I going to, you know, what am I going to book in some relaxation time because that's going to need to happen? Uh, cause I, uh, longtime listeners, I don't love working on the weekends and evenings are not my favorite to work in either.

So, um, I just, my work does is not as good in those times. Um, And I need that rest and rejuvenation. So yeah, I don't have an answer other than I also struggle with this. Well, I think the other challenge too, for me is that COVID, this COVID period is a very strange time because we're not traveling and we're not getting the same kind of vacation arrests that we kind of normally would, and I can take vacation from work, but it's a little bit.

Different, you know, now I have to be kind of thoughtful about when I do that. Um, just because of stuff that comes up around COVID related issues. So I think, um, it's. I feel like I'm negotiating that right now and just kind of like dealing with it, you know, and, and it's, it's fine. But I would also say there's a certain level of fatigue that comes with the COVID stuff that is, can impact work.

And, you know, if I have a COVID day, like people say, you know, I have a COVID day, it's hard to kind of show up, you know, in the ways you normally would. The other thing that I think is important for me to note here, And this is kind of another, you know, Achilles heel, or just like an area of sensitivity for me is I happen to have a really independent partner.

I don't have kids and he is willing to put up with a lot, like, I mean, like he understands that if I have to choose, like, if I've got a client on the schedule and I have to use my last bit of energy for the day to kind of serve that client well, I'm going to be a little bit of a zombie after that. And he is really good about like helping me close out the day, get to bed on time, like make sure that I have what I need, you know, like checking in with me, like, have I taken my meds?

How about, you know, like he's, he's good about kind of caretaking that. And I definitely recognize that not every partner would be that way and he's not jealous of the business in a way that I think other people might be and. I would not be able to do what I do if I didn't have the setup that I have where he doesn't question it.

I mean, he just knows I'm serving clients and he sees the energy I get from that. But he also sees the depletion of it. And especially I think during this COVID period where you you're fighting and battling with a lot of things, um, So I, I think that that's another piece of this that I would just layer in that everybody, I think some people look at my schedule and they're like, how are you doing that?

And I'm like, there is a constellation of things that is allowing me to do this. That is very unique and personalized to my life, my personality, my experience, my history, my background that allows this, we all have that. Yeah, we all have that constellation of things. And so I think when it comes to even the stuff like marketing and sales to kind of bring it back to that conversation, we all have a secret sauce.

We all have a thing we're putting out there. We'll have different ways of, of having magnetism. But we also have boundaries. We have, you know, these other things that we get to decide. Where those lines are. And hopefully we're all listening to ourselves to some degree and having some level of, of kind of self knowledge that we know, you know, when we hit that capacity or when we need to build in the rest.

Yeah, I would really echo that, that, that, you know, my life is, is also very set up to allow me to do this the way that I need to do it right now. And I know that that may not always be the case and that there are going to be times when we need to focus and double down on my, um, my husband's career. And that's.

Great. I'm I, you know, I am I'm game for that. And we've had that switch off happen many times already in our, in our marriage. And so, um, you know, he, he understands that this period is a period of growth for me and that that's important and that's important to me and it's important to us. And so, um, I would, I would echo those sentiments exactly.

Katie, that like he's being super supportive and, you know, kind of understanding that like this needs to take a priority. Um, but at the same time, that's also a reminder to me that I need to make sure that I'm making him a priority too. And, and making time for that, you know, that time that we share together, uh, to kind of rest and recuperate.

I mean, that's, as you said, Katie, this time is really great, weird, really weird, and it's harder to find those pockets of, of not only time, but the thing that. Pockets of energy that really refill you in the ways that you need, um, when every day feels safe. Yeah. Yeah. I would agree with that. I think that there are things that used to rejuvenate me and they aren't as much.

And part of it is probably a tinge of burnout. If I'm being honest, you know, I think a lot of us are feeling that where, you know, we're, we're not. We can't and we also can't get like the massage, the, the things that I would normally do, they even the haircut, I haven't had my hair cut in a year. I mean, it's just like, there's just certain things that I would go to, to kind of relax and, and especially physically relaxed.

Yeah. And I'm not really able to do those things right now. So it's little stuff. And I mean, let me be clear in the big picture. This is not the stuff that I really am prioritizing and focusing on right now, but it adds up like all those little things that we're. Maneuvering around that we can't necessarily do in the way we used to.

I think it adds up and there is a kind of cognitive and emotional toll to that, that we're all processing. Whether we know consciously that we're doing it or not. Yep. Yeah. I would agree. Okay. Anything else about sales and marketing? Have we covered our basis? I think so. We didn't really talk about tactics at all, but like, I'm not thinking about tactics right now.

So yeah, I mean, we talked about room. I think that if people pay attention, they'll know you're a couple of tactics in there.

It fits, it fits with the theme of the season. We're reflecting. And, uh, Oh, I am excited Katie about the next episode, because all right, listeners, you need to go back before you listened to the next episode. You need to go back and listen to episode, episode three, five, something like it's like episode three.

Yeah, it's like super early. We'll make sure it's linked in the show notes. Uh, but where we talked about our biggest fears in our businesses, I looked it up. It was published in November of 2017. Uh, we were babies, we were babies. So Katie and I are going to be reflecting a little on that episode and seeing not only what is similar, but also what has very much changed, uh, since we did that episode and talk a little bit about our fears going forward.

So I'm looking forward to that conversation. Me too. Well, Sarah, thanks for another good conversation this round and I will talk with you. Okay, bye. 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.