

Systems Creation – Work Smarter, Not Harder

Toolbox Teleclass Transcription

By Debra Russell



Foundation Program

**Track 3: Nuts & Bolts: The Fundamentals of
Business**



TABLE OF CONTENTS

I.	Intro – Why Create Systems? 0:00-0:10.....	8
A.	Ask: why would you want to create a system for something?	8
1.	Saves time in the long run.....	8
2.	Frees you up to do more of the creative work you love.....	8
3.	Easier to Delegate!	8
4.	More professional / credible	8
5.	Increases your confidence and	9
6.	Sense of control over your Business.....	9
7.	No more recreating the wheel	9
8.	Eliminates THINKING; facilitates DOING	9
9.	Enables you to stop and pick back up where you left off.....	9
10.	Reduces the number of DECISIONS you need to make – the decisions have already been made and incorporated into the system.....	9
II.	When to Create a System 0:10-0:15	14
A.	Anything you do more than twice is a candidate for systematizing	14
1.	So how do you identify the systems you will put in place?	14
B.	Questions to ask to identify your systems creation projects:.....	14
1.	How time-consuming is the task,	14
2.	How much do you resist or struggle with the task,	14
3.	Does it lend itself to automating or systematizing.....	15
4.	How quickly can you set the procedure up?	15
5.	How badly do you want to delegate it to someone else?	15
C.	The answers to these questions will help you to identify and prioritize your system creation.....	15
III.	Things to Systematize (exs) –0:15-0:25	16
A.	Contact management.....	16
1.	Keep all your contacts in one system & one place, so you can find them easily	



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

2. Systematize your follow-ups, so you keep all conversations / relationships ongoing or until they reach a conclusion (either yes or no – maybe is not a conclusion) 16
3. A good contact management system makes it easy to contact whole classes of people with one action (e.g., one e-mail) 16
4. Systematizing your contacts will facilitate marketing as you get busier and more successful both for acquiring new gigs and for marketing the ones you have – thereby avoiding the rollercoaster of success..... 16
- B. Production and distribution of materials for booking and producing events 17
 1. Press kits or portfolios 17
 2. Gigs – procedures, what to prepare, what to bring (keep a “gig bag” ready to go) 17
 3. Conferences – similar to gigs 17
 4. Promoting Gigs..... 17
- C. Finances..... 17
 1. Simplifies taxes immensely! 17
 2. You always know what you have, what you need, what you owe and how you're going to pay it 18
 3. Saves you money in finance and late charges 18
 4. Saves your credit rating 18
 5. The biggest reason why businesses fail is the lack of cash flow management.. 18
- D. E-mail, postal mail handling 18
- E. Any repetitive business or personal tasks 18
 1. Making booking calls 19
 2. Newsletter production 19
 3. Uploading new events / products to your web site 19
 4. Continuing Education and professional development (skill practice, AE Member calls, etc.) 19
 5. Filing and paperwork 19
 6. Laundry and housework 19
 7. Diet and Exercise 19
- F. Daily personal routines..... 19



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

1. Morning routine	19
2. Evening routine	19
3. Also weekly routines, monthly, other periodic – errands, doctors appointments, car maintenance, etc.....	19
IV. Blocks to Systematizing – 0:25-35	10
A. What are yours? Here's the myths and the truth:	10
B. Fear of stifling creativity	10
1. Contrary to belief of many creative people, systems actually facilitate creativity – they free you up and provide time and energy for it	10
C. It will take longer to systematize than to do the task	11
1. Yes, it takes time to set-up – but once it's set-up, it's set up for good and it will save you time in the long run	11
2. You want to create a system for creating systems:.....	11
3. Remember- it's worth the implementation time if it breaks you out of the cycle of having to do or recreate a repetitive, unfulfilling task over & over	12
4. Ask if there's a piece you can implement first that will save you some time right away, then you can systematize the rest in stages.....	12
5. E-Myth: to be successful, it's critical to make time for working on your business as well as in it	12
D. Not knowing how / not having the right tools	13
1. We're going to talk about that shortly.....	Error! Bookmark not defined.
E. Thinking it's impossible	13
1. Henry Ford – if you think you can or think you can't, either way you're right – and he was the master of systems after all!	Error! Bookmark not defined.
F. The task is different every time, too many variables	13
1. Look for the commonalities, and systematize everything you can – leave “fill-in blanks” for the parts that need to be customized	Error! Bookmark not defined.
V. Systematizing vs Automating – 0:35-0:45	19
A. Systematize = create a defined system for.....	19
B. Automate = make automatic	20
C. Systematizing streamlines, simplifies, speeds up, and adds consistency & reliability to your actions – but it's still you doing it	20



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

D. Automation takes you out of the equation – the work gets done with minimal or no input from you.....	20
E. Both are extremely worthwhile – automation will generally save you more time, but may take more time to implement – some tasks lend themselves to automation more than others	20
F. You can combine them – automate part of a routine task, and systematize the rest – but it's almost impossible to automate something effectively without creating a system to support it.....	20
G. Example – Bill Paying:.....	21
1. Systematized.....	21
2. Automated	22
VI. Methods for Creating Your System 1:00-1:15.....	22
A. Create a single, organized place to store all related information for each system 23	
1. time management system / calendar / to-do list.....	23
2. contact management system (these two should be connected)	23
3. Quicken / Quickbooks / etc for finances and a single container for bills to be paid, receipts to be entered	23
4. Incoming Mail – I sort mail into 3 or 4 folders.....	24
5. Directions / maps.....	24
6. once you've created your system, notice whenever you put information elsewhere, like scraps of paper, and decide if you need to shift your system to be more organic (shoe example) or develop the habit of using your system or both ..	24
B. Create & document procedures.....	25
1. Next time you do a task you want to systematize, keep a running log of each step and review your log for:.....	25
2. Keep all procedures in one place	26
3. Create agendas for all meetings	26
4. Create guidelines, policies and procedures	26
5. Develop scripts for common phone calls, meetings, conversations	27
C. Create form documents, e-mails, etc for routine uses.....	27
1. e.g., e-mails for each stage of booking procedure	27



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

2. have physical materials like press kits made up ahead of time, so you can send them out as needed – always keep component materials and assembled final products in stock (good for things like cooking too – cook in quantities and freeze)
27
3. keep them all in one place, e.g., a press kit corner, for easy assembly 29
4. Keep things where you'll use them 29
- D. Create a regular (e.g. weekly) meeting for joint projects, businesses, families, etc – Wendy 29
 1. Eliminates need for interruptions – can save most questions, requests, etc for next meeting..... 29
 2. Peace of mind of all participants – knowing issues will get dealt with, and when
30
 3. Having a regular time eliminates time spent scheduling next meeting 30
- E. Automated or systematized reminders 30
 1. alarms 31
 2. tickler system..... 31
 3. 3x5 card system..... 31
 4. Outlook or calendar system 31
- F. Automate 31
 1. use systems that are available to you, e.g. automate bill-paying 31
 2. have groceries & other products delivered automatically – many companies will set up auto-delivery on a schedule for a discount..... 31
 3. write or purchase a computer program that does something so you don't have to do it manually 31
 4. macros, rules, shortcuts 31
- G. Find tools that simplify complicated procedures 31
 1. E.g, card reader 32
 2. Click-n-Ship at usps.com..... 32
 3. Checking bank accounts on-line..... 32
 4. Purchasing on-line – saves money & time..... 32
 5. Free teleconference services for meetings by phone 32
 6. PDA – keep your schedule, contacts, to-do's, notes, procedures, all in one place..... 32



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

7. Tools for specific uses, like Outlook, Quickbooks/Quicken, TraxTime, etc	32
H. Ask others for their systems – why reinvent the wheel when you can copy someone else's system!.....	32
I. Get your assistant to help you create and document the systems.....	33
VII. Lessons of Systematizing – 1:15-1:30	33
A. Document everything you do	33
B. Delegate everything you can	Error! Bookmark not defined.
C. Make regular time in your schedule for creating your systems	33
D. Always be asking, how can I systematize or automate this? How can I simplify it? How can I delegate it? Do I love doing this? If not, what can I do about it?	33
E. Creation of Systems is a process – Use the scientific method -- be willing to experiment and change things – be assessing and adjusting each time you run the process until it feels really good.....	33
F. You can also look at your system as an income stream! (e.g. Jeri Goldstein's Manager in a Box, IndieBandManager, Franklin-Covey Planners).....	35
VIII. Coaching.....	35



I. INTRO – WHY CREATE SYSTEMS?

A. ASK: WHY WOULD YOU WANT TO CREATE A SYSTEM FOR SOMETHING?

Welcome to the July Toolbox Teleclass. This is Debra Russell, and we're going to be talking about Creating Systems: How to Work Smarter Not Harder.

This is a critically important skill and concept really to make your business work. And over and over and over again I've worked with private clients to do exactly, this set up systems, and I've seen their ability to run their business, to run their lives, their ability to be more creative. Their ability to work really hard without burning out, their level of success in their business to just go up and up and up the more systems they put into place.

So this is really critical in this day and age of the DIY artist, meaning that you're pretty much doing it yourself or delegating sections of your business off to other people. Getting this set up and handled for yourself, I can't even begin to tell you how important it is for the success of your business, so let's dive right into it. So, why should you create systems? Why? Why would you want to do that?

1. SAVES TIME IN THE LONG RUN

First of all, I'm going to give you the top 10 reasons. First of all, it saves time in the long run. The more you systematize something, the faster, smoother, easier it goes. So, it saves time.

2. FREES YOU UP TO DO MORE OF THE CREATIVE WORK YOU LOVE

Secondly, it frees you up to do more of the creative work you love because you're spending less time, right? So, it opens up time.

3. EASIER TO DELEGATE!

It becomes much easier to delegate something that you've systematized because all you have to do to delegate it is hand over the document that basically lays out what the system is and any idiot can follow the instructions. Step 1 do this, step 2 do that, step 3 do that. So, it makes it much easier to delegate.

4. MORE PROFESSIONAL / CREDIBLE

The fourth reason why you would want to create a system is because it will have you appear more professional and more credible, because when someone gives you an opportunity, you can respond to that opportunity with the same level of professionalism every time, because all you got to do is follow the system.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

5. INCREASES YOUR CONFIDENCE AND

It's going to increase your confidence, because again you can respond to an opportunity with the same level of professionalism, just follow the direction every time.

6. SENSE OF CONTROL OVER YOUR BUSINESS

Number 6, it's going to increase your sense of control over your business because if an opportunity comes your way you're going to be able to say, "Yes, I can do that because I've got a system set up to take advantage of that opportunity," or "No, you know I've got too many things going on and I'm maxed out."

It will give you a much bigger sense of control, because you'll know where you are in any given process on any given project.

7. NO MORE RECREATING THE WHEEL

The 7th reason why you would want a system is because you won't have to recreate the wheel over and over again. And I'll get into a lot more detail on that in a bit, but once you've set up a system once, you just keep running it, you don't have to recreate it every time.

8. ELIMINATES THINKING; FACILITATES DOING

Number 8 is that it eliminates thinking and facilitates doing, because you don't have to figure out how to do it, you have a system, and you just run the system. So you don't have to think about it, you just run it. It will enable you to much more quickly act on an opportunity because you just start the system rolling.

9. ENABLES YOU TO STOP AND PICK BACK UP WHERE YOU LEFT OFF.

Number 9, it enables you to stop and pick back up where you left off. So, let's say you're working on your finances and you've got an hour and you've got five hours of work to do. If you have a system set up, you work for that hour and set it aside, and two days later when you've got another hour to put in, you'll open your system back up and know exactly where you left off and exactly what you have to do next. because you're just working the system.

10. REDUCES THE NUMBER OF DECISIONS YOU NEED TO MAKE – THE DECISIONS HAVE ALREADY BEEN MADE AND INCORPORATED INTO THE SYSTEM

And finally the top 10 of these...and these by the way are not organized in any particular order, but I do like this one the most. It reduces the number of decisions you



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

have to make, because the majority of decisions have already been made within the design of the system.

So again, you don't need to figure out what to do because you've already figured out what to do. You just run the system.

So, that's why you want systems. But I have over and over again, I've worked with enough private clients on creating systems to realize that a lot of people have obstacles to just even the concept of creating a system.

And let's get... Let's name those elephants in the room and get them out of the way right up front. So, you might want to take a minute after you listen to the sections or call to really think about what has been your obstacle, and if there are additional obstacles that I don't list here, feel free to submit them as a question for the Ask Coach Debra call, because I'll be happy to help you figure out a way around that obstacle, because again I think creating systems is absolutely vital to your success.

II. BLOCKS TO SYSTEMATIZING

A. WHAT ARE YOURS? HERE'S THE MYTHS AND THE TRUTH:

So here are the myths and what I've found to be the truth.

1. FEAR OF STIFLING CREATIVITY

The first one is this fear that if you systematize things, it will stifle your creativity, and I have found exactly the opposite to be true.

CONTRARY TO BELIEF OF MANY CREATIVE PEOPLE, SYSTEMS ACTUALLY FACILITATE CREATIVITY – THEY FREE YOU UP AND PROVIDE TIME AND ENERGY FOR IT

It is not only not only stifled creativity, it is facilitated in absolute explosion of creativity among my clients. They've done... written more music, painted more work, felt more free about their creativity, because they won't worrying about all the other stuff they had to do because they knew they had that stuff handled.

There were systems set up. They were running the systems or they had delegated the systems. It was handled so they could really be free to create. It frees up time, energy and focus for you to create.



2. IT WILL TAKE LONGER TO SYSTEMATIZE THAN TO DO THE TASK

The second one that I've seen over and over again, and I've come up against this one a lot myself is that it will take longer to systematize than to do the task. You know what? That's true while you're building the system.

YES, IT TAKES TIME TO SET-UP – BUT ONCE IT'S SET-UP, IT'S SET UP FOR GOOD AND IT WILL SAVE YOU TIME IN THE LONG RUN

Building a system takes time. I'm not going to you know, sugar coat that. Building a system will take more time than doing the task, because you are documenting what you're doing, how you're doing it. You're thinking about what are the decision points, you know, all of that stuff it takes time.

But here's the thing, it takes time while you're building the system. Once the system is set up, it will save you time every time you use it. It will save you time because you will have streamlined and put into the right order your actions, so that you do it you know the same way, every time.

It will save you time because you won't have to figure it out as you go. You won't have to stop what you're doing in order to figure it out. It will save you time because it will stop you from making mistakes that then cost you time because you've systematized it. Those mistakes have already been solved and answered, okay?

YOU WANT TO CREATE A SYSTEM FOR CREATING SYSTEMS:

It will take time to create a system the first time, but once you've set it up, it will save you time every time. I actually recommend creating a system for creating systems.

a) It becomes easier to do, the more systems you create

You know, it becomes easier to do the more systems you create, so perhaps you want to at the end of this call, brainstorm a list of all the systems you want to do.

b) break it down and develop your system a piece at a time

And then figure out what do you need to do in order to set up a system and systematize that and break it down so you can develop your systems one piece at a time.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

REMEMBER- IT'S WORTH THE IMPLEMENTATION TIME IF IT BREAKS YOU OUT OF THE CYCLE OF HAVING TO DO OR RECREATE A REPETITIVE, UNFULFILLING TASK OVER & OVER

Now this is going to become clearer as I get deeper into this context. Remember, it's worth the implementation time if it breaks you out of the cycle of having to do or recreate a repetitive unfulfilling task over and over again. It's worth it, I promise.

ASK IF THERE'S A PIECE YOU CAN IMPLEMENT FIRST THAT WILL SAVE YOU SOME TIME RIGHT AWAY, THEN YOU CAN SYSTEMATIZE THE REST IN STAGES

And very often if you feel like, you know, it's going to take you so much longer to create the system and you just don't have the time, you might want to ask if there's a piece--ask yourself--if there's a piece you can implement first that will save you time right away and then you can systematize the rest in stages.

Very often, the moment that you realize you need a system for an activity is when you're up against the deadline for that activity, and you're like you know, "Damn! I wish I had a system for this, because boy, this would be working so much better but I don't and I don't have time to create it now."

So even if the system once small piece that you can do, even if all you do is document what you're doing, as you're doing it. You just jot it down, you just make a list--a bullet point list of the step that you will then review and organize and hone and polish later.

E-MYTH: TO BE SUCCESSFUL, IT'S CRITICAL TO MAKE TIME FOR WORKING ON YOUR BUSINESS AS WELL AS IN IT

In the E Myth Revisited, this is a very important business book to have read, to understand why you're doing this. One of the things he talks about is to be successful, it is critical to make time for working on your business as well as in it. So, block time out to create systems.

So, that's the second block is that it's going to take you longer to systemize the task than to actually do the task.



3. NOT KNOWING HOW / NOT HAVING THE RIGHT TOOLS

The third block most often is that people don't... They just kind of fundamentally don't get what it is to create a system. They don't know how, they don't have tools. They don't even have language for how to do this, and hopefully, by the end of this call that will no longer be true for you. That's the purpose of this call.

4. THINKING IT'S IMPOSSIBLE

The fourth obstacle or block for creating systems is thinking that it's impossible.

HENRY FORD – IF YOU THINK YOU CAN OR THINK YOU CAN'T, EITHER WAY YOU'RE RIGHT – AND HE WAS THE MASTER OF SYSTEMS AFTER ALL!

Well, Henry Ford, the Master of Systems, said that, "If you think you can or you think you can't, either way you're right." So if you think you can't create a system, then you're right.

I'm going to hope that by the end of this call you will not only think you can create a system, but start getting excited about creating systems for yourself.

5. THE TASK IS DIFFERENT EVERY TIME, TOO MANY VARIABLES

And the final block is I think one of the bigger challenges, which is the task is different every time. It feels like it has too many variables. It has too many decision points. How could you possibly create a system for it?

LOOK FOR THE COMMONALITIES, AND SYSTEMATIZE EVERYTHING YOU CAN – LEAVE "FILL-IN BLANKS" FOR THE PARTS THAT NEED TO BE CUSTOMIZED

If it is an activity that you do repeatedly, I challenge you to look for the commonalities, look for the things that are the same, even if the whole overall thing isn't the same, look for the pieces that are the same and systematize everything you can and just leave fill-in blanks for the parts that need to be customized.

So, for example, if you're creating a package to send in response to a booking request, and you want to personalize that package, great! Create a form letter for all the pieces that are the same every time, and then just fill in the paragraph or two that's personalized.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

So in other words, systematize what you can and then just leave blanks for what needs to get filled in for the individual time.

The other thing that... One of my clients did really beautifully for his booking system was to create a flowchart that included the decision points. So the, you know, at each point where the customer or the client decided whether or not to book him, if yes, if no, it maybe, he had kind of a flow chart. So if yes, these were the task that you did. If maybe, these were the follow up tasks. If no, these were the follow up tasks.

And so, he created a system that basically had a flowchart. So that it really was the same every time, even though you never knew which answer you would get at each decision point.

6. WHEN TO CREATE A SYSTEM

So, let's talk about when to create a system. So, what are kind of-- what are the things that really are the places for that systems are really made for.

a. ANYTHING YOU DO MORE THAN TWICE IS A CANDIDATE FOR SYSTEMATIZING

So, anything you do more than twice is a candidate for systematizing.

i. *SO HOW DO YOU IDENTIFY THE SYSTEMS YOU WILL PUT IN PLACE?*

Anything you do more than twice is a candidate for systematizing. So, how do you identify the systems you will put in place, right? So here are some questions to ask yourself. To identify what are the areas that you want to create systems for. What are the projects that you want to create systems? What are the systems creation projects you want to put on your list?

b. QUESTIONS TO ASK TO IDENTIFY YOUR SYSTEMS CREATION PROJECTS:

i. *HOW TIME-CONSUMING IS THE TASK,*

So first of all how time consuming is the task? If it's a quick little itty-bitty task, it may not be worth creating a system for. Is it a huge monster of a task? The bigger the task it is and you're doing it more than once, the more valuable a system will become.

ii. *HOW MUCH DO YOU RESIST OR STRUGGLE WITH THE TASK,*

Second question, how much do you resist or struggle with the task? The harder you find the task, probably the more you will benefit from having a system for it, because very



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

often the reason we resist or struggle with the task is, because there's all of these thinking and decision making that had go into that task.

And so if you have, in advance, made all those decisions, and then you just have to do the actions, it will reduce your struggle level with that task.

iii. DOES IT LEND ITSELF TO AUTOMATING OR SYSTEMATIZING

Does it lend itself to automating or systematizing? I mean, is the activities really the same every time. Are there systems out there that are already exist for this thing? And could it be something you could automate?

I have systematize and automated a lot of my social media stuff, not all of it, I still engage in person--if you will--but a lot of...if you follow me on Twitter, it looks like I am on Twitter all day long and I'm never doing anything else. That's not true. It's automated. So I've created a system for it, and I've automated huge chunks of that system.

iv. HOW QUICKLY CAN YOU SET THE PROCEDURE UP?

The next question is how quickly do you think you could set the procedure up? It may be that if you have a lot of resistance to creating systems that you want to create a couple of really fast and easy ones.

You know, go into your email and create some filters. That's a really quick system to set up.

v. HOW BADLY DO YOU WANT TO DELEGATE IT TO SOMEONE ELSE?

And the final question and this is really critical. It's how badly do you want to be able to delegate it to someone else?

If you really hate the system and this task or series of tasks and you wish to God you could delegate it, systematize it because once it's systematized it becomes so easy to delegate. Here, follow these directions.

C. THE ANSWERS TO THESE QUESTIONS WILL HELP YOU TO IDENTIFY AND PRIORITIZE YOUR SYSTEM CREATION

The answers to these questions are going to help you to identify and prioritize your system creation. As I said, create a system for creating systems by brainstorming a list and putting them in order, the order in which you want to attack it.

So, let me give you some ideas for things that are really in my experience well suited to systems. These are just examples and it's not a complete list by any means. I expect that once you start setting up systems, you're going to see all kinds of things that you could create systems for.



First of all, time management is a system. Now I have a bunch of classes on time management and project management. Those are really just teaching you how to create systems for time management and project management, right? That's all that is.

So time management I would recommend is by far the most important system to have set up, honed and polish, because if you don't manage your time well you won't be able to do anything well. So time management and physical organization are areas that are really well suited to systems.

7. THINGS TO SYSTEMATIZE (EXS)

a. CONTACT MANAGEMENT

Contact management is hugely benefits from creating systems.

- i. *KEEP ALL YOUR CONTACTS IN ONE SYSTEM & ONE PLACE, SO YOU CAN FIND THEM EASILY*

Keep all your contacts in one system and in one place that you can find them easily.

- ii. *SYSTEMATIZE YOUR FOLLOW-UPS, SO YOU KEEP ALL CONVERSATIONS / RELATIONSHIPS ONGOING OR UNTIL THEY REACH A CONCLUSION (EITHER YES OR NO – MAYBE IS NOT A CONCLUSION)*

Systematize your follow ups so you can keep all the conversations and relationships ongoing or until they reach a conclusion, either a yes or a no.

By the way, a maybe or no response is not a conclusion. It's just maybe or a no response. You don't know whether it's a yes or no, but that's a topic for another class.

- iii. *A GOOD CONTACT MANAGEMENT SYSTEM MAKES IT EASY TO CONTACT WHOLE CLASSES OF PEOPLE WITH ONE ACTION (E.G., ONE E-MAIL)*

A good contact management system makes it easy to contact whole classes of people with one action. For example, having an email list set up through something like Mail Chimp or Constant Contact or Reverbnation or any of the dozen outside systems for managing those contacts.

- iv. *SYSTEMATIZING YOUR CONTACTS WILL FACILITATE MARKETING AS YOU GET BUSIER AND MORE SUCCESSFUL BOTH FOR ACQUIRING*



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

NEW GIGS AND FOR MARKETING THE ONES YOU HAVE – THEREBY AVOIDING THE ROLLERCOASTER OF SUCCESS

Systematizing your contacts are going to facilitate marketing as you get busier and more successful for acquiring new gigs and for marketing the ones you're already doing, thereby avoiding that kind of roller coaster of success that I talk about in the [Business Management for Creative Minds](#) class.

b. PRODUCTION AND DISTRIBUTION OF MATERIALS FOR BOOKING AND PRODUCING EVENTS

So another area for possible systemization is production and distribution of materials for booking and producing events.

i. PRESS KITS OR PORTFOLIOS

So, things like your press kits or your portfolios, things like your gigs.

ii. GIGS – PROCEDURES, WHAT TO PREPARE, WHAT TO BRING (KEEP A "GIG BAG" READY TO GO)

So procedures, what do you have to prepare? What to bring? You know, keeping a packing list or even an already packed gig bag ready to go? What do you have to do after the gig?

You know, before you put your gig bag away, what do you need to check in it to make sure, you know, refill anything that's been depleted and all of that?

iii. CONFERENCES – SIMILAR TO GIGS

Same if you go to a lot of conferences, it's similar to the gig. I have a packing list. I also have a system for every conference or speaking engagement that I do.

iv. PROMOTING GIGS

Promotion is hugely benefited from systems, especially once you really get busy, because if you start getting really busy, you're going to want to delegate your promotion to someone else, because you'll be too busy to promote your gigs. And so again, anything you want to delegate, you want to systematize.

C. FINANCES

Finances is a huge area that benefits from systematizing.

i. SIMPLIFIES TAXES IMMENSELY!

It simplifies your taxes immensely.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

ii. YOU ALWAYS KNOW WHAT YOU HAVE, WHAT YOU NEED, WHAT YOU OWE AND HOW YOU'RE GOING TO PAY IT

You will always know what you have, what you need, what you owe, and how you're going to pay it.

iii. SAVES YOU MONEY IN FINANCE AND LATE CHARGES

A good financial system saves you money in finance and late charges.

iv. SAVES YOUR CREDIT RATING

A good financial system can absolutely save or improve your credit rating.

v. THE BIGGEST REASON WHY BUSINESSES FAIL IS THE LACK OF CASH FLOW MANAGEMENT

And the biggest reason why businesses fail is the lack of cash flow management, and cash flow management is a key system for any successful business.

d. E-MAIL, POSTAL MAIL HANDLING

I already kind of mentioned this but email or postal mail, like physical snail mail handling, hugely benefits from systematizing. I have a whole bunch of labels and filters set up for my email, which has vastly reduced my email clutter.

e. ANY REPETITIVE BUSINESS OR PERSONAL TASKS

Any repetitive business or personal tasks. So, for example, making booking calls, newsletter production, uploading new events or products to your website, uploading blogs and blogging can benefit from systematizing.

Your continuing education and professional development. For example, how do you work with the Artist Marketing and Business Academy could benefit from a system? Your filing and paperwork, your laundry and house work, your diet and exercise, all of these things could benefit from systems.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

- i. *MAKING BOOKING CALLS*
- ii. *NEWSLETTER PRODUCTION*
- iii. *UPLOADING NEW EVENTS / PRODUCTS TO YOUR WEB SITE*
- iv. *CONTINUING EDUCATION AND PROFESSIONAL DEVELOPMENT
(SKILL PRACTICE, AE MEMBER CALLS, ETC.)*
- v. *FILING AND PAPERWORK*
- vi. *LAUNDRY AND HOUSEWORK*
- vii. *DIET AND EXERCISE*

f. DAILY PERSONAL ROUTINES

Your daily personal routine, so I kind of hinted at this in saying that time management but just how you do your morning and evening routine. Also weekly routines, anything that is repetitive, you know, errands, doctor's appointments, car maintenance, you know, anything that is repeated in your daily or weekly or monthly routine.

- i. *MORNING ROUTINE*
- ii. *EVENING ROUTINE*
- iii. *ALSO WEEKLY ROUTINES, MONTHLY, OTHER PERIODIC –
ERRANDS, DOCTORS APPOINTMENTS, CAR MAINTENANCE, ETC.*

8. SYSTEMATIZING VS AUTOMATING

So, now that we've talked about just all of these possible areas for systematizing. I just want to get some things, you know... I just want to identify some language that people very often confuse.

So, there's systematizing versus automating.

a. SYSTEMATIZE = CREATE A DEFINED SYSTEM FOR

So, a system is a series of actions or decisions that are basically the same every time you do them. So it's a series of repeated actions that you've documented so they are repeated in exactly the same way every time.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

b. AUTOMATE = MAKE AUTOMATIC

Automating is basically a system that you are no longer doing yourself. You've made it automatic. For example, my bill payment is systematized and mostly automated. So, I created a system first and then I automated the pieces that I could automate. So if the bill is the same every month, I automated that. If it's not the same every month, I have a system for running it so that it gets paid.

c. SYSTEMATIZING STREAMLINES, SIMPLIFIES, SPEEDS UP, AND ADDS CONSISTENCY & RELIABILITY TO YOUR ACTIONS – BUT IT'S STILL YOU DOING IT

Systematizing streamline, simplifies, speeds up and adds consistency and reliability to your actions but it's still you doing it. Automation takes you out of the equation. The work gets done with minimal or no input from you, both are extremely worthwhile.

d. AUTOMATION TAKES YOU OUT OF THE EQUATION – THE WORK GETS DONE WITH MINIMAL OR NO INPUT FROM YOU

e. BOTH ARE EXTREMELY WORTHWHILE – AUTOMATION WILL GENERALLY SAVE YOUR MORE TIME, BUT MAY TAKE MORE TIME TO IMPLEMENT – SOME TASKS LEND THEMSELVES TO AUTOMATION MORE THAN OTHERS

Automation will generally save you more time but may take more time to implement. Some tasks really lend themselves to automation more than others.

f. YOU CAN COMBINE THEM – AUTOMATE PART OF A ROUTINE TASK, AND SYSTEMATIZE THE REST – BUT IT'S ALMOST IMPOSSIBLE TO AUTOMATE SOMETHING EFFECTIVELY WITHOUT CREATING A SYSTEM TO SUPPORT IT.

You can combine them. Automate part of a routine task and systematize the rest like I talked about with Twitter. You know, I've automated the pieces that I could automate, but I've also budgeted time for the pieces that I can't automate and then I have a system for running them.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

It's almost impossible to automate something effectively without first creating a system to support it. I recommend against setting it and forgetting it. You want to set it and periodically check back in and make sure it's happening the way you want it to happen.

g. EXAMPLE – BILL PAYING:

i. SYSTEMATIZED

So, let me give you the example, my example for bill paying. The systematized part, you have documented a procedure for what to do with incoming bills and a schedule for when and how you pay them.

- 1. You have a documented procedure for what to do with incoming bills and a schedule for paying them**
- 2. All your materials – the bills, the stamps, the checks – are in one place that is easily accessed and easily cleaned up.**

All of your materials, the bills, the stamps, the checks are in one place that is easily accessed and easily cleaned up.

- 3. Your bills are organized by date to be paid and you easily pay what's due in small chunks of time**

Your bills are organized by the date to be paid and you easily pay what is due in small chunks of time or even better you've coordinated your due dates, so that you only have to pay bills once a month.

- 4. Or even better, you've coordinated your due dates so you only have to pay bills once/month**

And by the way, most bills, most companies will allow you to choose when your bill payment is. Now that's the system, okay?



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

ii. *AUTOMATED*

1. You upload the billing info into your bank's online billpay system and set-up an automatic monthly payment

The automated part is that you've uploaded the billing info into your bank's online bill pay system and set up an automatic monthly payment.

2. You've created automated bills in your quickbooks or quicken so you know what's due when.

You've created automated bills in either your QuickBooks or Quicken, so you know what's due when and you download your bank information once a week, so you know your balance and you know your bills will be paid on time and you know that you have enough money to cover that.

3. You download your bank information once per week, so you know your balance - and you know your bills will be paid on time.

One great way to approximate automation is to have someone else do it for you!

So, a great way to approximate automation is to have someone else do it for you. That's called delegation. It's even more critically important that you don't set it and forget it when you hand any system off to another person, because you don't know that they're doing what they're supposed to be doing, unless you have some accountability systems in place to make sure that they're are doing what they say they are doing, okay?

Break 15 minutes

9. METHODS FOR CREATING YOUR SYSTEM



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

So let's talk about some specific methods for creating your system and give me a moment to take a drink of water.

a. CREATE A SINGLE, ORGANIZED PLACE TO STORE ALL RELATED INFORMATION FOR EACH SYSTEM

i. TIME MANAGEMENT SYSTEM / CALENDAR / TO-DO LIST

So, first of all I recommend creating a single, organized place to store all related information for each system.

And where that place is is going to depend a bit on what that system is. So for example, your time management system might live in your calendar--in your to-do list and how you set that up depends on how you set up your system.

ii. CONTACT MANAGEMENT SYSTEM (THESE TWO SHOULD BE CONNECTED)

Your contact management system, and by the way, ideally, contact management and time management are to some degree connected, so that you get reminders of who you need to contact and when, so you can do it in a timely way.

But again, contact management system might be a physical system, you know, you might have a series of post it... not post it, but a 3 x 5 card management system or you may have an online database system set up. So, how you set that up, where it is located, depends on how you set it up.

iii. QUICKEN / QUICKBOOKS / ETC FOR FINANCES AND A SINGLE CONTAINER FOR BILLS TO BE PAID, RECEIPTS TO BE ENTERED

Quicken, QuickBooks, etc. for finances and a single container for bills to be paid, receipts to be entered, etc. all in one place.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

iv. INCOMING MAIL – I SORT MAIL INTO 3 OR 4 FOLDERS

Your incoming mail-- I tend to sort mail into three or four folders: paying bills, urgent to do, non-urgent to do, and pending, meaning that I've taken the action but I'm waiting for a response. I don't like to put my incoming mail in a big pile. I like to sort it as soon as it comes in--into the appropriate folder. Otherwise, it just builds clutter.

1. Paying Bills

2. Urgent To Do

3. Non-Urgent To Do

4. Pending (I've taken action and I'm waiting for response)

v. DIRECTIONS / MAPS

You could have a single-organized place for direction and maps. These days with you know apps and Google Maps a lot-- this is becoming less and less necessary.

vi. ONCE YOU'VE CREATED YOUR SYSTEM, NOTICE WHENEVER YOU PUT INFORMATION ELSEWHERE, LIKE SCRAPS OF PAPER, AND DECIDE IF YOU NEED TO SHIFT YOUR SYSTEM TO BE MORE ORGANIC (SHOE EXAMPLE) OR DEVELOP THE HABIT OF USING YOUR SYSTEM OR BOTH

Once you've created your system, notice whenever you put information somewhere else, like scrapes of paper or whatever, and decide if you need to shift your system to be more organic.

For example, if you tend to walk into the house and kick off your shoes, but your shoe organization system is in your bedroom closet, you're going to end up with a pile of clutter. Maybe you want to have a place for your shoes right by the front door, okay?



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

So, you just need to figure out what works best for you organically. I talk a lot more about that in the Organizing...in the [Get Organized class](#) by the way.

b. CREATE & DOCUMENT PROCEDURES

Next, you want to create and document procedures. So next time you do a task that you want to systematize, keep a running log of each step. And then once you've logged each step, so for example, the next time you do your finances just write down every step on a separate sheet of paper, just jot it down.

i. NEXT TIME YOU DO A TASK YOU WANT TO SYSTEMATIZE, KEEP A RUNNING LOG OF EACH STEP AND REVIEW YOUR LOG FOR:

And then afterwards review your log for the pieces that are identical each time so you can create forms and procedures for this thing. Look for the most efficient order in which to do things, so the order that you're actually doing them in may not be the best order. You may find yourself backtracking, and that's really going to show up when you start to create a system for it.

- 1. the pieces that are identical each time so you can create forms and procedures,**
- 2. look for the most efficient order in which to do things,**
- 3. identify wasted or repetitive steps**
- 4. Turn your log into a checklist**

Identify anything that's wasted or repetitive, and then, you know, make sure that that's covered in your system. And then just basically take your log and turn it into a checklist. I recommend that that checklist not be handwritten. That it be put on your computer in a folder where all your systems live or all your like systems live, so that you can print it out every time you have to run it.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

The other option is once you've printed it, put it into a sheet protector and get those pens for use on a whiteboard because they're erasable. And if you use them on top of the sheet protector, you can just erase it, just clean it off with a damp paper towel the next time you want to run the system. So, you can check it off as you're working the system and then erase it and run it again.

ii. KEEP ALL PROCEDURES IN ONE PLACE

Again keep up procedures in one place. Excel tabs on an Excel spreadsheet is one way to do this if you're really computer-based. If you're more tactile and physical-based you might want to just create a procedure manual, and like I said use the sheet protectors.

1. Excel tabs are great for this

2. Procedure manual

iii. CREATE AGENDAS FOR ALL MEETINGS

One of the things that you can do by the way is actually this is located in the wrong place. It should be located in place for procedures is create agendas for all meetings.

So if you tend to have meetings with people over and over again, let's say you meet with your booking agent once a week or you meet with an assistant once a week or something like that or you meet with an assistant at the beginning of every day, create an agenda for those meetings and systematize that agenda so that it's pretty much the same every time.

iv. CREATE GUIDELINES, POLICIES AND PROCEDURES

You could also create guideline policies and procedures both for you and for your clients.

1. Both for you and for your clients

If you're a private client of mine, you know that I have a list of policies. I even give you a checklist for how to prepare for your private session. That's a system.

It's a system I created to help you be fully prepared for your sessions. Some clients use it, some clients don't, and some clients even send it to me. They don't have to, because it's for their use not mine, but you know.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

For example by the way, you know I created some guidelines for myself for these Toolbox Teleclasses, and I actually posted those in the upcoming tentative calendar.

I'm not committed to them. You know, if a booking gig comes up, makes it impossible-- or you know a speaking engagement comes up it makes it impossible, I'll deal with that, but I've basically schedule tentatively out for the next several months. That's a system.

2. e.g, our quarterly rotation for TT calls – eliminates need for thinking

3. Price list for products and services

You could create a system for a price list for your products and services. That's a system. A price list is a system. Again, you've made the decision once you don't need to keep making the decision how much do you charge.

4. Guidelines for gigs, students, etc.

You could create guidelines for gigs, for students, for clients, for customers, for fans. You could create guidelines for, for assistants. You can create guidelines for agents and managers, because remember they work for you.

V. DEVELOP SCRIPTS FOR COMMON PHONE CALLS, MEETINGS, CONVERSATIONS

C. CREATE FORM DOCUMENTS, E-MAILS, ETC FOR ROUTINE USES

i. E.G., E-MAILS FOR EACH STAGE OF BOOKING PROCEDURE

Now, once you've created and documented these procedures, you want to create the pieces that fit into these procedures. So for example, you want to create the form documents, the emails etc. for routine uses. For example, you might want to create a form email for each stage of the booking procedure.

Again, if you hire me as a private coach, you're going to get different form emails depending on where you are in the process. And I personalize them, but pretty much they're a form, and it's the same for every client.

ii. HAVE PHYSICAL MATERIALS LIKE PRESS KITS MADE UP AHEAD OF TIME, SO YOU CAN SEND THEM OUT AS NEEDED – ALWAYS KEEP COMPONENT MATERIALS AND ASSEMBLED FINAL PRODUCTS IN



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

STOCK (GOOD FOR THINGS LIKE COOKING TOO – COOK IN QUANTITIES AND FREEZE)

Have physical materials like your press kits, for example, made up ahead of time so you can send them out as needed. Always keep the component materials and assembled final product in stock. By the way, this is really good for things like cooking--if you cook in quantities and freeze.

So for example, I had a client who would sit down...would schedule at 2-hour booking call chunk of time, and she would end up making 3 booking calls, and I asked her you know, "Why are you only getting through 3 calls in 2 hours, that's (seems to me) kind of ridiculous?".

Well, it wasn't because she was spending a lot of time on the actual phone call, it's that when someone asked her for her promo package or her press kit, she would stop, get up, and make the press kit for that person. That might include printing out a new one sheet which might mean that she created a new one sheet.

A personalized cover letter, she would have to burn a CD--a sample CD--every time. All these things she would do from scratch. So, the first thing we did was have her create a mailing section of her closet and she created it with a one sheet that you know she would have maybe 20 or 30 printed out one sheets there.

She don't want to do more because she'd like to update them with new gigs, and new quotes, and all of that stuff, and that's fine but she would print out maybe 20 of them. A pile of CD's ready to be put in the mail. Her envelopes, her postage, everything, laid out in order in which it went into her package.

So, let's say she would sit down, and she would do booking calls. She would at the end of each booking call make some notes about the booking call on her contact management system, all the personal data that she got, any personalized note that she wants to make sure goes in the cover letter, and she would then schedule the task of creating the marketing package and sending it out.

At the end of that 2-hour booking session, she's scheduled a half an hour for sending out whatever marketing packages were ready. She would open up the form letter, grab the content that she had on the person's contact sheet, popped that into the form letter so that it looked personalized, printed it out, and then go boom, boom, boom, boom, boom, fill up the marketing package, put it in a pile, do the next one, do the next one, put them out for the mail.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

Then even better, she documented that system so that she was doing the booking calls, and she had an assistant who would have a list of marketing packages. All she ever ended up doing was creating the cover letter, and everything else her assistant would do because the system was set up.

So, instead of getting through 3 calls in a 2-hour period, she was getting through 8-10 calls in a two-hour period. I want to promise you that she was booking a lot more gigs.

iii. KEEP THEM ALL IN ONE PLACE, E.G., A PRESS KIT CORNER, FOR EASY ASSEMBLY

The other thing about creating these physical and electronic forms, and you know, the pieces for your system is to keep things where you'll use them.

iv. KEEP THINGS WHERE YOU'LL USE THEM

If you have to go into your basement every time you want to create a marketing package, it's going to slow you down. So, keep things physically where you'll use them.

d. CREATE A REGULAR (E.G. WEEKLY) MEETING FOR JOINT PROJECTS, BUSINESSES, FAMILIES, ETC – WENDY

You can also systematize meetings, and I talk a little bit about this. You could create regular i.e. weekly meeting for joint projects, for your business, for families. If you have a family with a couple of kids, you could create a weekly scheduling meeting that could include all of the schedules for the chores for each member.

The scheduling, creating the schedule for who needs to be, where, what and whose job it is to get them there. So, you could set up a weekly meeting, get this all done at once, create the physical system for documenting that, and boom! Your family is going to run a lot better.

i. ELIMINATES NEED FOR INTERRUPTIONS – CAN SAVE MOST QUESTIONS, REQUESTS, ETC FOR NEXT MEETING

If these are set up regularly and everybody knows what the agenda is, it's going to greatly eliminate the needs for interruptions because they will be able to save most questions and/or requests for the next meeting.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

ii. PEACE OF MIND OF ALL PARTICIPANTS – KNOWING ISSUES WILL GET DEALT WITH, AND WHEN

It's going to give peace of mind to all the participants because they know their issues will get dealt with and when they'll get dealt with.

iii. HAVING A REGULAR TIME ELIMINATES TIME SPENT SCHEDULING NEXT MEETING

And having a regular time eliminates that time you spent scheduling the next meeting. So for example, if you're working with a band, schedule...sit down once and schedule all the rehearsals for the next month, once. The beginning of the month you schedule the month's rehearsals, you schedule the chores and who's taking care of them, and you do it once.

And then you have a system set up maybe a Google calendar that everybody has access to so they know what to do when. Including all the promotion, the website, the fans base interaction. This can really help to eliminate time spent.

e. AUTOMATED OR SYSTEMATIZED REMINDERS

Now, you want to automate or systematize the reminders for how this happens. That could mean that you set up alarms in your calendar system. That could mean that you have a tickler system set up through your contact management program.

I use Monymoon, which is an app for my Google apps. Whatever works for you. There's a lot of different systems out there, so look for what's going to work for you.

If you go into the [admin section of my resources on the website](#), you'll see a lot of information about systems. You can use Outlook or your calendar system, however you have that set up, and again if you want specific advice about this, send it in as a question for the Ask Coach Debra.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

i. ALARMS

ii. TICKLER SYSTEM

iii. 3x5 CARD SYSTEM

iv. OUTLOOK OR CALENDAR SYSTEM

f. AUTOMATE

i. USE SYSTEMS THAT ARE AVAILABLE TO YOU, E.G. AUTOMATE BILL-PAYING

Now, let's talk a little bit about automating these. I strongly recommend using systems that already exist--someone else programmed it, such as bill paying on your bank. Contact management systems like Indie Band Manager or your Bento or Daylight for Mac or whatever, you know whatever you want to use, an app for your iPhone, but find a system that someone else already created.

ii. HAVE GROCERIES & OTHER PRODUCTS DELIVERED AUTOMATICALLY – MANY COMPANIES WILL SET UP AUTO-DELIVERY ON A SCHEDULE FOR A DISCOUNT

You could have your groceries and other products delivered automatically every month. A lot of company set up auto delivery on a schedule and many will include a discount or free shipping, because they know you're a good customer, you're going to come back every month.

iii. WRITE OR PURCHASE A COMPUTER PROGRAM THAT DOES SOMETHING SO YOU DON'T HAVE TO DO IT MANUALLY

If you're really talented, you could write a computer program, but I recommend instead purchasing one because why spend your time that way?

iv. MACROS, RULES, SHORTCUTS

There's just a lot of ways to do this, for example, setting up email filters and folders for organizing this stuff. A lot of times you could automate things.

1. email rules

g. FIND TOOLS THAT SIMPLIFY COMPLICATED PROCEDURES

Find tools that will simplify complicated procedures. For example, I go to a networking meeting, and I'll come home with 20 or 30 business cards, so I purchased a card reader. It was a hundred and some bucks, but man, it was worth it!



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

i. E.G, CARD READER

So instead of having the hand type all those business cards, I just feed them through the reader. I still have to go in and make sure that the reader you know, put the right information and the right way because the fancier the business card the less effective it is.

ii. CLICK-N-SHIP AT USPS.COM

But it still saves me a ton of time, and it saves my hands for doing all that typing. Things I click and ship with US postal service, purchasing things online can save time and money because you're not running around.

iii. CHECKING BANK ACCOUNTS ON-LINE

iv. PURCHASING ON-LINE – SAVES MONEY & TIME

v. FREE TELECONFERENCE SERVICES FOR MEETINGS BY PHONE

Things like free teleconference services or Skype for meetings by phone. Your PDA, your iPhone or your iPad or Blackberry, or whatever, keeping your schedule, your contacts, your to-dos, your notes, your procedures all in one place.

vi. PDA – KEEP YOUR SCHEDULE, CONTACTS, TO-DO'S, NOTES, PROCEDURES, ALL IN ONE PLACE

vii. TOOLS FOR SPECIFIC USES, LIKE OUTLOOK, QUICKBOOKS/QUICKEN, TRAXTIME, ETC

And also tools for specific uses like Outlook, QuickBooks or Quicken, you know, Indie Band Manager, Bento, Daylight, there's a million of them which leads me to the next thing, which is to ask other people what systems they use?

h. ASK OTHERS FOR THEIR SYSTEMS – WHY REINVENT THE WHEEL WHEN YOU CAN COPY SOMEONE ELSE'S SYSTEM!

Why reinvent the wheel when you can copy someone else's system? Frankly, all of the systems that I use for my private clients were copied either verbatim or with some personalization, some individuation from my coaching mentor. I literally took her systems and copied them with her permission, obviously.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

i. GET YOUR ASSISTANT TO HELP YOU CREATE AND DOCUMENT THE SYSTEMS

You can also if you're working with an assistant, you can get your assistant to create and document your system. So for example, if you're doing it, have your assistant sit next to you while you're doing it and document it, then let your assistant edit that document, put it up on the computer, and then let your assistant take this--the system--and go do it.

So, you are both training, documenting, creating the system and delegating all in one full swoop. So in other words, you run the system while your system sit next to you and documents every step.

Then your assistant types up that documentation making sure they understand each step as they're typing it. Then you guys together hone and polish that system, and then you delegate it and let your assistant do it.

10. LESSONS OF SYSTEMATIZING –

Here are some lessons, finally, that I have found from my years of systematizing and I've been systematizing in one way or another since I started pursuing a full time acting career in 1983. So I've been using systems in my business for too many years. What is that 28 years, something like that?

a. DOCUMENT EVERYTHING YOU DO

Document everything you do. Delegate everything you can.

b. MAKE REGULAR TIME IN YOUR SCHEDULE FOR CREATING YOUR SYSTEMS

Make a regular time in your schedule for creating your systems. So maybe every Friday afternoon from... Well, Friday may not be good for your touring musicians. Maybe Monday afternoon from 3-6 you work on systems.

c. ALWAYS BE ASKING, HOW CAN I SYSTEMATIZE OR AUTOMATE THIS? HOW CAN I SIMPLIFY IT? HOW CAN I DELEGATE IT? DO I LOVE DOING THIS? IF NOT, WHAT CAN I DO ABOUT IT?

Always be asking yourself how can I systematize or automate this? Any activity you're doing, how can I simplify it? How can I delegate it? Do I love doing this? If not, what can do about that?

d. CREATION OF SYSTEMS IS A PROCESS – USE THE SCIENTIFIC METHOD -- BE WILLING TO EXPERIMENT AND CHANGE THINGS – BE ASSESSING AND



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

ADJUSTING EACH TIME YOU RUN THE PROCESS UNTIL IT FEELS REALLY GOOD.

The creation of your systems is a process. Use the scientific method. Be willing to experiment and change things. Be assessing and adjusting each time you run the process until it feels really smooth and good.

I will promise you that when I set up my finance system, I probably edited it about 20 times before I really liked it, and then I ran it for about a year and then I edited it again, and then I ran it for a year, and every time I would come back and reassess and edit it, it got cleaner, it got smoother, it got more automated.

Now, part of that was because tools were starting to show up in my environment. So like when I first created my finance system there was no bill pay, there was no downloading your information to Quicken and QuickBooks. That stuff didn't exist! I had to hand-enter everything.

So you know, part of changing it was taking advantage of new tools that became available. But really the key to this is use the scientific method and for those of you who don't remember the scientific method from high school....

Notice a problem, create a theory about that problem, test--create an experiment to test that theory, run the experiment, use the result of the experiment to hone your theory, create a new test for that new set honed theory, run that test, use the result of that test to hone your theory. So the way that would look with your system is notice an area that is a problem for you and that would benefit from a system.

Create a theory of what system might work for it. In other words, document and set up a series of actions that you could do, run that system, check in on how well it worked, using the information from how well it worked to adjust your theory, in other words, adjust your system, run the system again and see how well it worked. See how this works?

So if you're not thinking, "I'm going to create the perfect system the first time," if you're thinking in terms of "I'm going to create a system and see how it goes and fix it as I work on it," you're going to find it a lot less stressful.



Artists Marketing & Business Academy: Foundation Program

Nuts & Bolts: The Fundamentals of Business

Systems Creation – Work Smarter, Not Harder

- e. YOU CAN ALSO LOOK AT YOUR SYSTEM AS AN INCOME STREAM! (E.G. JERI GOLDSTEIN'S MANAGER IN A BOX, INDIEBANDMANAGER, FRANKLIN-COVEY PLANNERS)

And finally, just a little bug in your brain. Ytimeou can also look at your system as an income stream. Almost every system you find out there for sale, originated because someone created a system for themselves and then decided to sell it.

So, Indie Band Manager came out of Charlie Cheney needing to create a contact management system for booking himself as an independent songwriter/singer songwriter. That's where Indie Band Manager came from. He happens to be a computer programmer, so he created it but now he sells it.

Anything that is like a manager in a box, booking in a box, anything like that came from someone looking at their system and setting up a system for it, and then documenting it and selling to other people. PR in a box, marketing in a box, right? You've seen these and you may wonder like where did these come from? Those are someone else's system.

11. COACHING

Now, the challenge with that maybe that that their systems and you need to adjust it to fit you, but that's okay it's a lot easier to adjust someone else's system to fit you than it is to create it from scratch. So anything that you do could then be marketed it as an eBook or as a system for someone else to use. Just something for you to think about.

Alright you guys, thus ends my Systems Creation: Work Smarter Not Harder. Feel free to submit your comments on the post after you've listened to this recording and submit your questions to the Ask Coach Debra call. Thanks very much! Have a great day.