Streamline Your Business with Systems

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- Editing is a craft, but you're running a business.
- Systems are the key to handling repeating situations and tasks.
- Your time, effort, and energy are valuable. Automate and systematize as much as you can to preserve your time, effort, and energy for the things that matter.
- People vary. What works for me may not work for you, and vice versa. Know thyself. Systems evolve. Develop systems that work for you and the way you work.
- Observe the pain points in your day, week, month, year. Make systems for those things that are repeating tasks and don't require fresh analysis every time you do them.
- Document. Review and evaluate. Tweak.
- Time invested up front will save you time down the road.
- Think efficiency.

Info collection/handling

Collect it somewhere other than in your head: notebook, Word doc, Evernote, database…

Create a client manual to corral information: names, contact info, rates, UPS/FedEx numbers…

Create a business manual for your own policies, procedures, and notes relevant to your business (for a list of what's in mine: http://www.loripax.com/2016/04/14/building-a-business-manual/).

Create a master project list to record all your projects.

Scheduling/PM/workflow

Multiple projects works best if they are at different stages.

Paper or electronic calendar, but keep everything on it. Be realistic about how long tasks take. (Time-track for several weeks to see how you're really spending your time [Toggl].)

Create workflows for processes you do multiple times or for each project: manuscript intake, editing invoicing, follow-up.

Utilize project management programs (Trello, Basecamp, Asana).

Block schedule/batch tasks.

Create a system for discovery calls with potential clients.

Email

Different accounts. Filtering. VIPs. Limit checking. Prepared responses. Deal with/schedule/file.

Six months folder for those messages you need to hold on to for a little while, but not forever.

Text expansion programs, like TextExpander or Phrase Express.

Marketing

Create a positive client experience (before, during, after) to generate positive word of mouth and repeat business.

Be ready for job opps as they arise on lists, in groups, etc.: resume, long and short bios, project lists, cover letters. Quickly generate proposals/quotes.

Be present on social media where your clients are (different for different client types).

Keep your website up-to-date. It can be your best marketing tool, especially with a blog to showcase expertise.

Admin

Money: invoices, receipts, taxes, bills.

Filing: legal stuff, envelope of destruction.

Equipment: maintenance, upgrades.

Travel: packing lists, flight & hotel info.

Don't organize what doesn't need to be organized.

Outsourcing

Stay in your zone of genius: editing, project management, etc. Hire someone to fact-check, edit references, etc.

Outsource home/non-work tasks to generate more time to work (grocery delivery, house cleaner, meal prep services).

Hire marketing help as needed: social media manager/scheduler, blog post writer.