

GET EFFICIENT

PREPARING FOR THE
CLONING PROCESS

HOW TO CLONE YOURSELF

w/ Amber McCue

GET EFFICIENT

Prep for the cloning process...

1. Get Organized - What you need when
2. Operations Manual - What goes in it + the easy way to make it so that you don't have to lift a finger
3. Working Tools - How to work with your clone + tools to help you manage files, applications, processes

YOUR GOAL SHOULDN'T BE TO BUY PLAYERS. YOUR GOAL SHOULD BE TO BUY WINS. AND IN ORDER TO BUY THE WINS YOU NEED TO BUY THE RUNS.

-Peter Brand, Moneyball





1. GET ORGANIZED

- What systems
- To focus on
- First...
- Second.
- And so forth



2. OPERATIONS MANUAL

- What goes in it
- How to make it
- What to think about as you build it



IT'S NOT ABOUT IDEAS.
IT'S ABOUT MAKING
IDEAS HAPPEN.

Scott Belsky
Co-Founder of Behance

3. WORKING TOOLS

- RACI
- Project Management
- Key Processes



CLONE YOURSELF. IT FEELS LIKE
SCIENCE. AND IT IS. LEARN
STRATEGIES THAT MULTIPLY YOU.



WHAT ARE SYSTEMS?

Process. Standard Operating Procedures. SOP's.

SYSTEMS DEFINED



the
WHAT, WHERE, WHEN,
WHY, WHO *of what you do*

**YOU KNOW YOUR SYSTEMS ARE WORKING
WHEN YOUR BUSINESS IS WORKING IN
HARMONY + YOU AND YOUR TEAM FEEL AT
EASE.**



- How to Clone Yourself

WHY SYSTEMS?

What systems will enable...

- You to responsibly and methodologically remove yourself and chaos from your business to the extent you choose.
- Increase productivity of your team – Tasks will be executed with less error and clarifying questions will be reduced
- Greater customer satisfaction and confidence resulting in higher sales and increased repeat business
- Better accountability of team members resulting from clarity in mission
- Ease of transition of team members
- Less reliance on key individuals, highly leveragable, dynamic team made possible
- Greater control over the flow of information resulting in less double work, less errors, and a happier business

GOALS FOR THIS WEEK

- Act on what you are ready to act on (no shame in not doing all the things)
- Must do ::
 - Complete your list of activities to systematize or outsource or keep (started in last module)
 - Prioritize what needs to be done 1st, 2nd, 3rd
- Bonus - Complete the RACI if you have team members or are looking to add team members to support your business



WHEN LIFE GIVES YOU LEMONS,
PLANT THE SEEDS AND GROW A
LEMON GROVE. / *Hazel Gadbois*

GET ORGANIZED

MODULE TWO - LESSON ONE

HOW TO CLONE YOURSELF

w/ Amber McCue

1. GET ORGANIZED

Prep for the cloning process...

- Customer centricity
- Your business
- Processes you have identified
- Other processes to consider
- Prioritize



CUSTOMER CENTRIC

- Our processes and systems should support our customers.
- While it is our business, we also have to consider the needs and the customer experience.
- Or we'll be out of business. Period.
- As you think about the places you need to systematize and get cloned, consider your customer lifecycle + what your customer needs from you each step of the way.

CUSTOMER LIFECYCLE



CUSTOMER LIFECYCLE



A woman with long brown hair, wearing a dark green short-sleeved dress and a gold necklace, is sitting on a stone ledge outdoors. She is smiling and looking towards the camera. The background features a light-colored wall with a small plaque that reads "LANDWEATH" and "1880". There are green plants and a body of water visible in the background.

What key touch points do you have with your customers that you benefit from being highly attentive to?

Or what key events do they have that you could get engaged in?

YOUR BUSINESS

- What do you do in your business?
- You started a list of activities last week in the Get Efficient Prioritization Matrix.
- Add to it today and finish it out.
- Leverage what you know about your business as well as the “Business Activities Inventory” to complete this exercise.

HOW TO CLONE YOURSELF

BUSINESS ACTIVITY INVENTORY

Leverage this worksheet as an inventory for possible activities you may want to consider for your business as you systematize, get efficient, outsource, and delight clients. Leverage this activity to brainstorm and add activities to your Get Efficient Worksheet.

CATEGORY	ACTIVITY
MARKETING	<ul style="list-style-type: none">• Social media• FB ads• Web design• Copy writing• SEO• Newsletter• Set up webinars
SALES	<ul style="list-style-type: none">• Sales page• Sales plan• Sales follow-up• Update CRM system• Service agreement signed
FINANCIALS	<ul style="list-style-type: none">• Send invoices• Manage the books• Track expenses• Budget• Budget VS. Actuals• Payroll/paying team
TECH	<ul style="list-style-type: none">• Backup files• Security

HOW TO CLONE YOURSELF

CATEGORY	ACTIVITY
CLIENT SERVICES	<ul style="list-style-type: none">• Customer service• Standard responses• Delivering products• Send welcome process• Prepping for meetings
OPERATIONS	<ul style="list-style-type: none">• Posting blogs• Email management• Operations manual• File management• Backing up files

PRIORITIZE

- Take the activities on your **Get Efficient Prioritization Worksheet**
- Number the activities that need to be attended to first (#1 being at the top of the list)
 - To prioritize, consider the **Get Efficient Prioritization Matrix**
 - Also consider:
 - Is it a revenue generating activity?
 - Is it client facing?
 - Is it a pain in the *ss and causing you and the team stress?
 - If you answered **yes** to any of those questions for the given process consider as top priority!

OPERATIONS MANUAL

MODULE TWO - LESSON TWO

HOW TO CLONE YOURSELF

w/ Amber McCue

A photograph of a Monstera plant with large, green, deeply lobed leaves. The plant is potted in a simple, unglazed terracotta pot. This pot is placed on top of a thick, cylindrical wooden stump, which shows natural wood grain and knots. The background is a white-painted brick wall. The lighting is soft and even, highlighting the textures of the plant, the pot, the wood, and the bricks.

What is...

OPERATIONS MANUAL

An organized way of documenting the various activities that go on in your business as a set of processes or systems.



2. OPERATIONS MANUAL

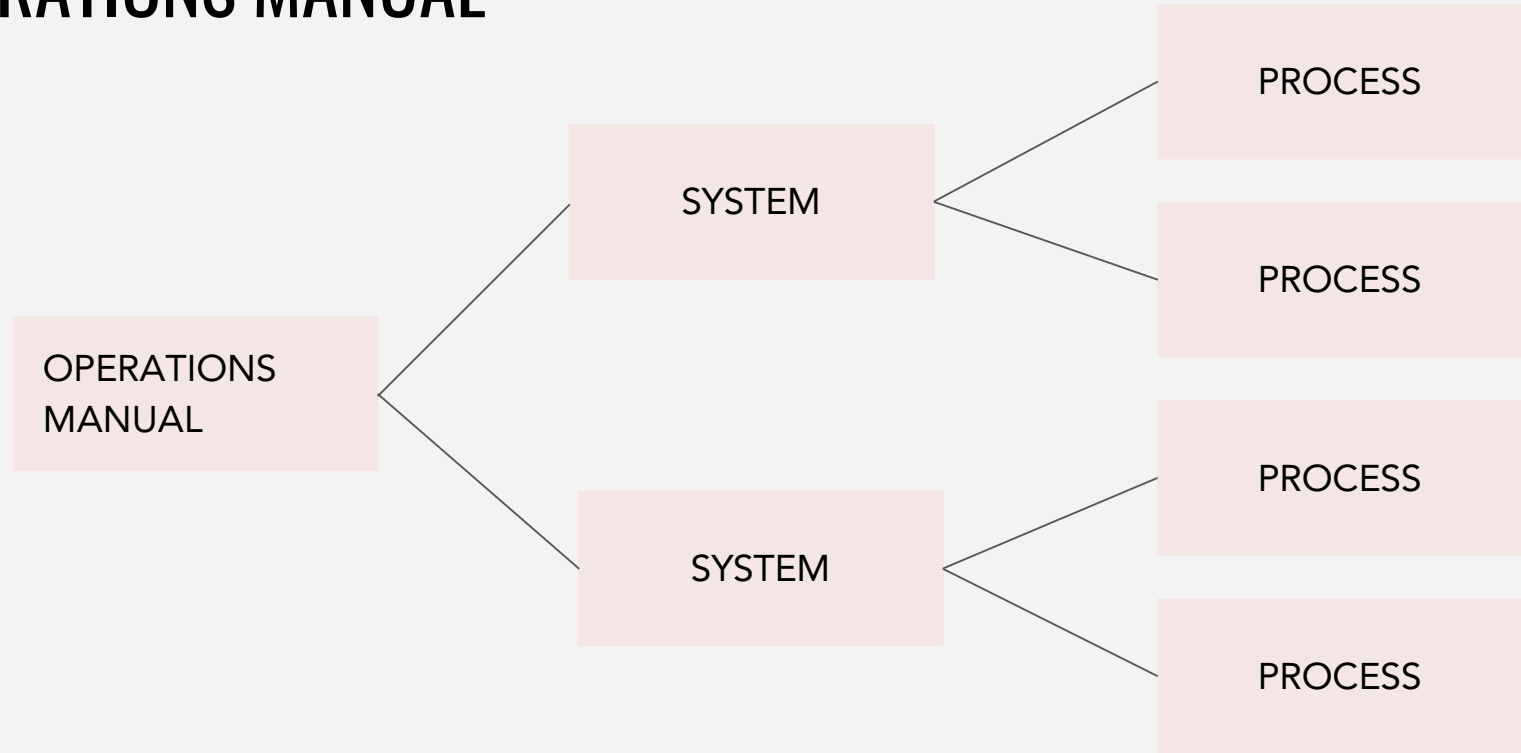
Prep for the cloning process...

- An organized way of documenting the various activities that go on in your business as a set of processes or systems.
- Outlining your operations manual will enable you to review how you do business in an organized way and to see what systems help you deliver on your goals.

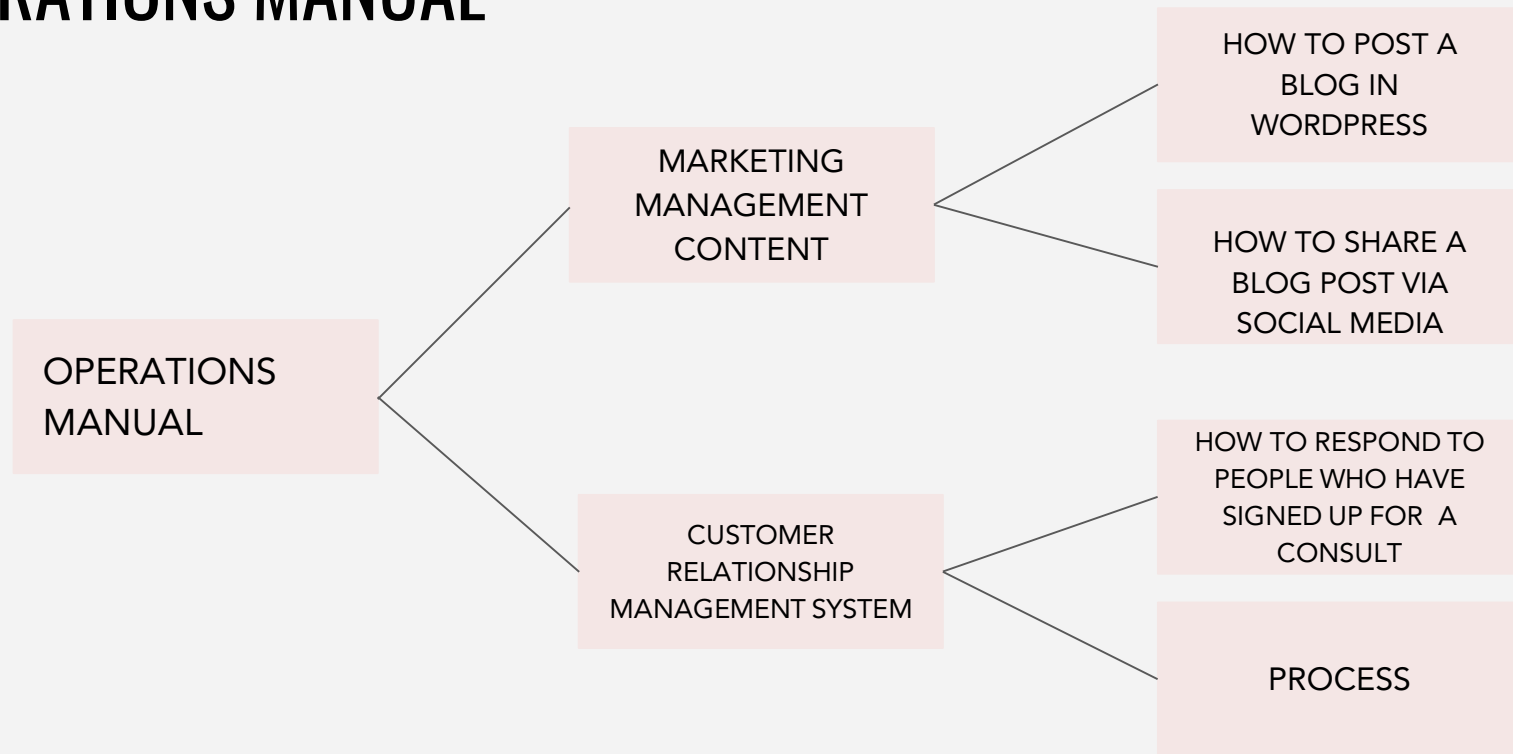
YOUR OPERATIONS MANUAL

- What goes in it?
- How do you make it?
- What do you think about as you build it?
 - Caution!
- How do you make sure *it* works and you are getting *it* right?

OPERATIONS MANUAL



OPERATIONS MANUAL



SYSTEMS DEFINED



the
WHAT, WHERE, WHEN,
WHY, WHO *of what you do*

HOW
EVERYTHING
WORKS
TOGETHER





The Process

**STEP BY STEP,
HOW THINGS GET
DONE.**

PROCESSES

TOPIC	NOTES
WHAT	What is the process?

PROCESSES

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GOAL	This is your why for every process. What do you intend to be accomplished with this process?

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TOOLS	What tools will be leveraged to accomplish this process? Where will this process be executed?
WHEN	Under what circumstances will this process be executed?

HOW TO CLONE YOURSELF

PROCESS EXAMPLE

Place Product Orders

WHAT	Use this guide to place WHCC product orders via Roes. The process is organized by product type for easy ordering reference.
GOAL	Placing product orders right the first time, will help us save money on misprints.
WHO	Albums <ul style="list-style-type: none"> Responsible - Client Experience Manager/Informed Owner Prints <ul style="list-style-type: none"> Responsible - CoFounder/Informed
TOOLS	Roes <ul style="list-style-type: none"> Application downloadable to your desktop, leverage this to place orders for WHCC
WHEN	WHCC is our primary print partner. This process will be used for all standard print orders. Custom print orders will be specified by the photographer.

HOW TO CLONE YOURSELF

PROCESS

Album Orders

1. Choose "press printed album"
2. Look up and select "Square"
3. "10 spread side" and size depending on order (i.e. 10x10)
4. Size options "Pearl UV Coat"
5. Cover options "non padded"
6. Cover material "Premium Black Leather"
7. Choose "folder" and select the folder from your files that you wish to upload into the album.
 - a. It will pull all of the .jpgs in the folder to be able to use in the album. Files must be in jpg format to order.
8. Drag jpg file onto album on its respective page
9. "Add to order"
10. "Review order"
11. Find client address in paypal order.
12. Choose "drop ship" and enter client address per paypal order so that the product will be sent directly to client and not to business address.
13. For albums, choose "premium shipping" and it will come wrapped and with a bow.
14. Confirm that payment will be through "Amber McCue" account, account details should be listed.

HOW TO CLONE YOURSELF

PROCESS

CD Case Orders

1. Choose "CD and DVD Cases"
2. CD Case Single
3. In CD Case Single Options, keep it on "Lustre Paper with Matte Laminate"
4. Choose jpg from folder, drag image to cd case.
5. "Add to order", continue as album above.

PROCESS

Prints

1. Choose size of print
 - a. If the order was placed for an 8x10, we have been ordering 8x12's because it fits the proportion of our jpg's and nothing will be cropped out).
2. Don't choose any upgrades, simply drag the file and add to order.

PROCESS

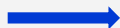
Mini Album

1. Mini Album
2. Options "Pearl UV Coat"
3. "Black Leather" Cover
4. Choose files, be sure front jpg is aligned with front on WHCC item.

HOW TO ACTUALLY CREATE YOUR OWN OPS MANUAL

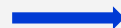
- Document the process
- Add pictures, graphics, and test the process as you go through it yourself

DO IT ALL



- Record the process as you walk someone else through it
- Ask them to review the video and go through the process as they document the steps you outlined in the video

GET HELP



- Go through the process as you would today, creating a step by step video
- Have someone else review your video and document the step taken
- Review the documented process when it is returned to you, test for clarity and accuracy (or ask someone removed to review and test)

HYBRID

BUILDING YOUR OPERATIONS MANUAL

What to think about...

- Don't get overwhelmed
- "It's not that deep"
- Keep it purposeful
- Every time you do something new, document it from the get go
- Consider "is this the sensible way to do this?"
- Build a quality review into a critical process

PRESSURE TEST THE PROCESS

- Ask different team members, observers of the process, or people in this group to review your process from an objective perspective
- Interview customers
 - a. How does xyz process work for them?
 - b. What do they think about it?
 - c. What do they think about the experience of working with your team?

CHALLENGE

- Choose one process
- Document it today so you can get a feel for the process
- Share it with your team or your business colleagues and get feedback



WORKING TOOLS

MODULE TWO - LESSON THREE

HOW TO CLONE YOURSELF

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3. WORKING TOOLS

Prep for the cloning process...

There are so many tools on the market. There are a couple of things you might want to think about *now* as you think *systems*, including:

- RACI
- Project management documents
- Key processes checklist

RACI

- Simply put, a RACI is a responsibility assignment matrix that let's the team know who is on point for what
- You can complete this and it will help you run your business, even if you do not have any documented processes in place

R	Responsible
A	Accountable
C	Consulted
I	Informed

RACI SAMPLE

RESPONSIBLE

The person who actually executes on the task.

ACCOUNTABLE

Who's on the hook for the activity? Typically the person delegating the work activity to the responsible party

CONSULTED

Subject matters experts who you may consult in a given process. Two way communication is used here vs. providing directives or instruction only

INFORMED

Someone who needs to be kept informed on the process or a resulting deliverable. Typically a one way communication update.



RACI :: RESPONSIBILITY BASED

Item	Activity	Responsible	Accountable	Consulted	Informed	Due Date	Status	Optional Categories
XXX	Sample:: Backup Website	Virtual Assistant	CEO	Web Designer	CEO	26-Jun	complete	
1	Post Blog on Wordpress	Virtual Assistant	Project Manager	You	You	7/27/2018	Started	
2	Social Media Posts for Blog Post	Virtual Assistant	You	You	You	7/27/2018	Started	
3	Create Blog Post	You	You	SME/Colle	Virtual Assistant	Weekly Monday	Weekly Monday	
4	Post promotions							
5	Announce program opening							
6	Activity							
7	Activity							
8	Activity							
9	Activity							
10	Activity							
11	Activity							
12	Activity							



RACI :: ROLE BASED

Item	Activity	VA	Web Designer	Customer Service	Owner
XXX	Sample:: Backup Website	Responsible	Consulted	N/A	Informed/Accountable
1	Activity	Consulted	Informed	Accountable	Responsible
2	Activity				
3	Activity				
4	Activity				
5	Activity				
6	Activity				
7	Activity				
8	Activity				
~	...				

RACI

Options and Template...

PROJECT MANAGEMENT DOCUMENTS

- There are some amazing project management tools on the market for small businesses.
- Sometimes a spreadsheet works well to keep everyone on track in a simple way.
- Be able to answer the question - Who's doing what when and what is the status?
- Optimize team performance and leverage it as a communication tool.

PROJECT MANAGEMENT TEMPLATES



OVERVIEW

Background

Use this document as relevant to keep yourself and/or your team organized around the project at hand. It may be your overall business operations plan or a smaller project.

Deliverables

What key deliverables or outcomes is this project plan supporting?

Next Steps

Our there any specific outstanding items at this time?



DETAILED PROJECT PLAN

Item	Category	Month	Activity (Time)	Notes	Who	Status
1	Web	October	Load Sales page (2)	Wordpress	Web	
2	Marketing	October	Start engaging on social media regularly (4)		Owner	
3	Marketing	October	Schedule tweets/Facebook posts/etc (1)		VA	
4	Content	November	Write four blog posts (2)		Owner	
5	Marketing	November	Draft and submit guest posts (3)	Ideally for December/January posting timeline	Owner	
6	Operations	November	Train VA (3)		Owner	
7	Program	December	Set up program back end (2)		VA	
8	Content	December	Start organizing content for program (3)	Structure of weekly classes, content for weekly classes, etc. Video vs. teleconference, etc.	Owner	
9	Content	December	Engage audience from blog (1.5)	Start dripping content to the people on your blog list... Engage them now so when you have something ready for them they are not surprised (takes people 7-9 times seeing you before they make the decision to buy). Potential survey, sneak peaks, heads up, etc.	Owner	
10	Content	January	Set up time trade account (1)	Gear up to hustle! :)	VA	

MASTER PROJECT PLAN

Item	Activity	Who	October	November
1	Activity			
2	Activity			
3	Activity			
4	Activity			
5	Activity			
6	Activity			
7	Activity			
8	Activity			
9	Activity			
10	Activity			
11	Activity			
12	Activity			
13	Activity			
14	Activity			
15	Activity			
16	Activity			
17	Activity			
18	Activity			
19	Activity			
20	Activity			
21	Activity			
22	Activity			
23	Activity			
24	Activity			

KEY PROCESSES CHECKLIST

- Earlier I cautioned you about being in process overload and overdoing it.
- There may be key processes or even programs you are running that would benefit from a process checklist.
- For example, if you are working through a critical process or if there is a complex activity team members engage in again and again and it is important to track.

KEY PROCESSES CHECKLIST

NEW CLIENT PROCESS	ORDER PROCESSING	FINAL ORDER
Send welcome email with contract	Edit pictures	CEM edits + prepares album
Confirm photoshoot date	Upload photos to online gallery	CEM sends proof
Make new client file	Email client link to gallery + order info	Client confirms proof
Receive contract	Receive order from client	CEM places order
Send invoice	Send payment request to client	CEM notifies PM of order
Receive payment	Receive payment	Manager closes client archives client file
Complete session	Add order to master to-do list	
Download pictures	Notify CEM of order	

TAKE TIME TO COMPLETE A RACI

- Complete a **RACI** for your business and all key processes listed in your **Get Efficient Worksheet**.
- Even if you are a solo-entrepreneur and aren't focused on building your team yet, there are vendors, business partners, or resources you leverage ad hoc, you can benefit from this exercise.

ANOTHER FULL WEEK

Whew! Enjoy the time off this weekend!

