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Expert Summit

MASTERCLASS TRANSCRIPT

Top Tech Tools for Brilliant Business

Hello.

Thank you so much for joining me for this session. My name is Alice and I help small business owners to find the right systems, tools, and processes to get their businesses running really efficiently and one of my big bugbears is people saying, you must use this particular system or way of working in order to be successful.

And that's completely not true. We are all different and our businesses all different. And in the same way that one particular outfit would look fabulous on one person and just not look right on someone else. The systems that we use in our business are really important, and the way that they fit us is also really important.

So we need to find things that work for us, that are comfortable and that we enjoy using.

I'm based in the UK, in a little village and in a county called Worcestershire, which is famous mainly for Worcestershire source, which is a lovely condiment if you ever want to try it. I have a family and a small flock of sheep.

We live in the countryside, so I'm out outdoors a lot of the time, when I'm not sat in front of my computer. And today I'm going to talk to you about top tech tools for brilliant business. And I am going to cover three areas. We're going to look at some time management tools, some task management tools, and some tech management tools.

And finally, I've got a little bonus for those of you who use video, this is my new favorite, so it doesn't really fit in any of the categories, but I love it and I wanted to share it with you. So hopefully you'll go away with some ideas for things to try in order that you might be able to get more done in less time.

And then the decision that you need to make is how you're going to spend that time, whether that's growing your business, spending more time with your family, doing the things you love, and that's your bit that you need to make the decision on. Right? So let's get started. I'm going to start with time management.

Time management really is just looking a little bit more carefully than we might normally at the way that we spend the time that we have. We all have the same number of hours in a day, and yet there are some people who get way more done than others. And looking at how we're spending our time is the first step to maybe moving up the scale in terms of the number of things that you're getting done.

Now, that doesn't mean you need to do loads of stuff, but if you can compress the work into a short space of time, leads you more free time. It's not always about working harder. It's about working smarter. And today I invite you to ask yourself two questions. Firstly, what am I doing with my time?

And secondly, what would I like to be doing? So the first question. What am I doing with my time? We can look at that in a bit of an audit quite easily. Either using a time-honored bit of paper, but do you like a bit of paper? Just cause I'm very tech loving doesn't mean I don't mind a bit of paper.

So I've got a printable worksheet for you. If you want to do a week of auditing your time, and I really suggest you do this if you've not done it before, it's really interesting to see every time you change task, you lose a bit of momentum, a bit of power. So we want to be batching up tasks so that we're doing groups of things together, not checking our email every 20 minutes because that breaks our train of thought and loses momentum.

And there is both a PDF and an Excel file. If you want to change that to every 15 minutes, even every 10 minutes, that's absolutely fine. But the first step is to track what you're doing. Now, that's a very analog way of doing it. Just write it down, put the bit of paper next to your desk, and maybe put a timer on.

So every half hour you get a reminder and you've written down what you've done. It's enlightening to know what you're up to. If, however you want a bit more of a technical solution. I'd love to introduce you to a tool called Rescue Time. Rescue Time (www.rescuetime.com)) is an app that sits on your desktop, both Macs and PCs, as well as your phone, your tablet, and across all the different platforms.

It gathers data about where you've been and what you've been doing, and you are able to tell it which places are productive versus unproductive. So we can see that I've got business, which is 48% of my time, unfortunately, in a recent computer rebuild my rescue time didn't get re-installed, so I've lost a month or so of data, which is a bit upsetting, but never mind.

So you can see that business, which is what I should be doing during the day. I spent 48% of my time on it, nearly an hour and 45 minutes of communication and scheduling. So that's zoom and GML. Maybe I could recategorize zoom, particularly at the moment as I'm doing so many meetings on it. And I can also set goals for how much time I want to be productive and how, you know, both positive and negative goals.

So I want to spend less than an hour on email every day. I didn't succeed on that particular day, but in spite of that, it's really insightful and a great way to give you a kick, to perhaps start to take a little bit more control over your time.

Question 2. What would you like to be doing with your time?

So last year I ran a series of interviews with small business owners asking them what their favorite piece of tech was. And I was amazed that about 50% of them came out with the same tool. And it's not a fancy tool. It's actually Google calendar. And Google calendar is so powerful if you set it up right and you use it right.

So let me just show you what I'm talking about in the hopes that maybe you too can become a Google calendar fan. So if we open a Google Calendar. It's just a plain old week. So we've

got nothing particular showing at the moment. What I do is I start each year by thinking about how much time I need to devote to each area of my business.

And from that, I create what I call a default calendar, and this is my business basics calendar. So I'm just going to switch that on and the joy of Google as it allows you to use these different calendars all at once. I've got my family calendar and some of the other tools that I use. And this is my default week.

So I start every Monday with some masterminding CEO time. I also do marketing on a Monday afternoon. I've got two full days booked in here for my client work, and I've got social content creation, or Friday morning and a newsletter creation on Friday afternoon. So that's all lovely and I can hear you going, yeah, but that's not real life.

And I completely agree. So what happens then is that my real life calendar, that's just the ideal. And what that means is that each week I'm making sure that there is space in my diary for these activities, and I overlay that onto the reality. So. I have a CEO meeting. So I have a group of people that, kind of get together and we act, see each other CEO's.

So, every Monday I meant to be doing this mastermind meeting, but I am also now clashing here with the CEO time. So if I look the business basics calendar allows me to just move that over here. So that's still occurring, and I'm just going to change this one about, so I should have said each of these events is in as either a weekly or a monthly recurring task.

So you can see across the top, I've also got my run, my malware scan. That's a Monday morning activity. I've got the Patreon payment due. Great to have all your payments in your Google calendar so you're not got any surprises. I've got QuickBooks payment coming out on Thursday, bank holiday on Friday. That's nice.

So I'm not going to be creating any social content on Friday. I've also got a networking meeting here, so I can see that this week is looking a little bit tight, and I've got two networking meetings but actually my client work is a bit quieter this week, so I could edit this down so that it wasn't going to take up so much of my day.

Just this event. And in the morning I will network in the afternoon. I will do the client work.

So can you see how that happens? And so if I maybe don't even manage to do something one week, maybe I don't get around to doing my social content or my marketing, I could just say that I can't, I definitely can't fit in.

It's my daughter's birthday on Sunday. There's so much on what I'm going to do is move my marketing from this week into next week. It means, I'll spent two half days on marketing next week and I can just drag it. Just that event. So then I'm still making space in my diary for that work because it meets my goals as a business.

So I've now got a free afternoon, and actually from my personal life perspective, that's much better. I can get ahead for my daughter's birthday, pressure's off, I've got complete flexibility over this diary. It's not going to rule me, but I can see what I'm up to. Okay. That was Google calendar.

And when we talk about what would we like to be doing, make sure that the things you would like to be doing are in your calendar. If that's having every Wednesday afternoon off, put it in your calendar. It's not going to happen unless it's in the diary and so claim back your time.

Moving on then we'll take a look at task management.

So as well as setting those areas of time to deal with different areas of your business, we need to look at the different tasks that you're doing, and a lot of people are walking around with millions of tasks in their head, finding it really stressful, but this is one area where really the tech can help.

So we want to get the tasks out of your head and into some kind of management tool. There are loads of tools out there that can help you with this. I'm going to show you two today and lightweight one and a super heavyweight one, depending on your preference. So let me show you. Firstly, we have a tool called to do list.

We're going to start off by taking a look at Todoist   (www.todoist.com) and Todoist is a lovely to do list tool. Again, this works on your phone, your desktop, your Apple, your Android, all of the platforms, and that's where it's really powerful because wherever you are your to do list is with you. You can create different projects within your to do list.

So you can see we've got, this is all listed at the moment by date, and we've got backup websites, which is a recurring task. So at the same as your diary, you could set your recurring tasks and to do list and to add a task, you simply click the plus button, pop in the task.

You can give it a date. Maybe I'll do that on Tuesday. We can give it a label. We can give it a priority and we can add reminders. Some of those features are on the premium. I use the free version. I have had the premium one, but I found it so good on basic that it was plenty for me. Once you do something, and I did actually back up the websites, I just forgot to tick.

I tick that so I can see all the things that are in my inbox. So these are all the things that I need to do. I can see what's upcoming by date and it's really flexible. The other really snazzy thing that it does that I think you're going to like is it integrates with Gmail. So if I get an email such as this one from myself, asking for help, obviously some data protection issues.

If I get an email, I click ads to do list, and I can turn that into a task in my to do next. And so here we go. I'm just going to add it as a task. And now if I look back in here, I have to refresh it. Fingers crossed, can you help from today? And that is linked back to the original email so I can start to create the tasks from inbox as well as my head in anywhere else.

That's a lovely starting point. If you haven't used a to do app before, if you're ready for something a little bit meatier, let me introduce you to my favorite tool at the moment. It's called click up. (www.clickup.com) I've got a demo version of it here for you, so it works in a really similar way to do it. It's based around tasks, it's just that the tasks can be grouped into lists.

The list can be put into folders and projects and spaces so that you can combine lots of different tasks and you can assign them. And I'll show you, because that's often easier. So this is your dashboard and you get the lists. Showing that, and you can have favorites. They always stay. We can create our own dashboard if we want to.

We can keep documents in here. So I've got a branding document, easy to refer back to at any point where I might need a logo. I've got my social shares, so all my social media links are in one place, makes it just quicker. And these are my trending tasks. These are tasks that need doing at moment or that have had activity on them.

And if I'm sharing this portal with other people, comments that have been assigned to me and people mentioned to me, so there's kind of a chat tool that sits within it that allows you to communicate. Instead of sending emails back and forth, we can look at things by task. And you can see down this left-hand side, we have spaces, two spaces, kind of like projects, depends on how your brain works.

This tool calls them spaces. Other tools might call them projects. And I have three, so in my life I have. Client dictated work my work. So that's, I treat that more as things that I'm in control of rather than things that my clients asked me to do. So my work would be things like marketing, admin, finance and personal, because my personal life, is obviously going to impact on my work.

And it's a great way of making sure that I don't overcommit. Now if I go to the list view.

So it's a great thing is about this tool that it allows you to view things in lots of different ways. Most people will pick one way and stick with that. But it does mean that if you're working with other people, so say you work with someone who loves Trello and you can't get on with the board it doesn't matter because you can both view exactly the same data in different ways.

And like you said, it's all dependent, it all starts with the task. So we can add new tasks really easily. But let me show you one that's already been created. So this is sitting within a list, which is setting up Steve's email marketing. And the task is to create a freebie so we can assign it to someone.

So this is assigned to Ruth, who is Steve's VA. We can give it a priority as high priority. We know here that it is blocking my ability to add the freebie to his website because until the freebie has been created, we can't add it anywhere. We can also add sub tasks if we want, and you can see how these tasks are. noted. So there's an audit trail of what's happened on that task. And perhaps when Ruth has completed it, she can just click on browse and pick up a file ready to drop in so she can just add the seven part template. That's the freebie, for example, and she can upload that and that will be there.

So then I can pick it up straight away. It doesn't need to come through an email. We all know where the latest version is because the latest version just sits within that task. These are all the tasks for this particular activity. Then I've got a website migration and some updates, and then I've got some website tweaks.

This lady, I've already finished the work for, so there's nothing showing, and then there's some other stuff showing under my everyday work, and. Bits of bits of work, finance. So finance, I've got reconcile payments that I do that mid-month, and that little twirly circle shows that it's a recurring task.

I've also put in my daughter's birthday, which happens to be next weekend, and I know that this week is going to be a little bit more hectic because of that. So I've popped in those tasks and I can see all those things in one place. I can drill down and just look at one particular area. By using my spaces and opening them out.

If I just want to look at Julie's website migration, I can do that too. And with all these different views, I can either look at the list, or, I can look at the board and the board. Is it still to do, has it been completed? And I can set up different statuses if I wanted to so I could have a status of In Progress.

And that could be a bright pink and maybe, I can choose to set that status across my whole space of clients or just on Julie's so you can configure it exactly. To work with the way that you want your business to be managed. Back up emails from right. That's in progress. And then when I've completed something, I just click to close the task and it automatically moves it into that completed area.

So I can see what's happened. As with Todoist I can also use it if I get an email in. In my email I just need to click on the little Click Up button once I've installed the Chrome extension and I can create a new task or I can attach it to a preexisting task, it can also track time if I want to, but I'm going to add it to a new task.

Where am I going to put that? I'm going to put it in everyday tasks. When I go back to Click Up.

If I look under my work every day, "can you help?" So the email is now attached and it's actually that as the full document. Unlike with, which just eScience a link back to the originally, this one saves the document and, and then I can look at all my stuff. So I find the key, the everything view. Either as a list or on the board doesn't work for my brain.

I can also hop this over so we can see it a little bit better. I really love being able to see the calendar. And fairly easy to sync that to my own Google calendar. Just on the bottom here at the settings, I can say, yes, connect this to my Google. Or you can see to Apple or outlook and what do I want it to be?

Synced everything and you can sync it to my main calendar. And then I look at my calendar, my Google calendar that I've just synced with. I can see that the tasks for the week are ready shown in this lilac color, which I can change under my calendar settings. I hope that gives you an overview of this fabulous tool, great free options, and up to five spaces you get limited on the amount of uploads you can do, but it's not a pricey tool. It's $5 a month or thereabouts per user, so it's not going to break the bank, and it really is a way of getting everything in one place so that your brain can be empty, yet you can feel calmer and enjoy your work and your life a little bit more.

So we've talked about time management, we've talked about task management. The other thing I wanted to talk to you about was tech management, and this is an acknowledgement that technology really can take over our lives if we're not careful. And I've got a lovely little app I'd like to share with you.

It's called forest. (https://www.forestapp.cc/) Here we go, and it's works on desktop and on phone, but most useful I find on phones. So I'm going to just talk you through it. It's basically those of you who remember Tamagochi, you have to grow your tree and keep it alive. So you pick a period of time that you want to be focused for.

And at the beginning of that period, you plant a tree on your app. And whilst the timer is going, your tree grows and if you leave the app during the growing period that you've set, the tree will die. And over time you build up your own little forest and you can do that with a group of people or on your own.

And one of my most favorite things is that as you grow a tree, you get leaves or coins, whatever it is you get, you get rewards, and when you get to two and a half thousand rewards, you can catch those in eight actually. Plants, a tree and real tree somewhere in the world. So your focus helps to plant trees.

And I've got the Chrome app here and all I need to do is click to start planting. I can choose from a whitelist or blacklist mode, so I've got control over what I can access. So I might white list my accounting package if what I need to do for the next 25 minutes is catching up on my reconciliation, or I might whitelist a research tool, but I can also just blacklist the sites that I know I shouldn't be on; Facebook, Instagram, the news, anything I don't want to use, so you can, again, you can tailor that to work in a way that suits you best. You hit the tree here and that's it. If I go somewhere else, if I don't leave this browser running nicely and I'm going to be in trouble and this poor little tree is going to die.

So I hope that also it gives you a another tool that you might find useful. And that really brings me to the end of my official presentation. But I did promise you an extra bonus feature, and that is one that I am really blown away by the technology that's in this tool and it's really useful if you need to do video editing.

Which is something that obviously I've needed to do for this particular presentation but let me show you. It's called Descript. (www.descript.com)

So this is it. It's not much to look at initially. othing to see here really. But first of all, we need to upload the video that we want transcribed. So we click in the middle and we pop out video in. Give it a second to upload. I'm going to fast forward for you. And you'll see that on the left here we have the option to transcribe one file.

When you first sign up, you get three hours free video transcription, which is actually a reasonable amount for most people. And after that, you will find that you need to pay $10 a month, which is really reasonable for as much transcription as you want. And I'm just going to click and transcribe. And we'll pop back in a few minutes and it will be ready for you.

And here we go. Don't you love the images that it video pulls out. What it's done is it's given it a name and it's transcribed all the text that I've said and matched to the words, the sound file down here. And the really incredible thing is that I can just delete or amend this text. So I wrote a book.

I did write a book called Sorted. There you go. I'm umming again. I'll be able to edit that out. Leeton and I can just delete that there and it goes from within the text and it's incredible. So if I play that back, I start here. And I'm not all geek. I do love computers. I do love technology, but I also love being outside rural.

Um, right. Want to get rid of that ummm. What do I do? I just click in the text,

"rural, rural Worcestershire, which is in the middle of the UK. I have a small flock of sheep, so I'm not all that all geek."

And why would I say all that? All geek. I can delete that as well. I don't think that's as incredible as I do. It's a really, really nifty way of editing your ums and ers and ahs. You can even take out whole paragraphs if you want.

I think you get better at them nails than me, so that pretty much leads me to the end of my presentation. I hope you've enjoyed this session. If you have, and you'd like to keep in touch. I would love to welcome you to my Facebook group, it's a no promos, tech loving place to come and find out about the latest things that I'm playing with, like descript and other tools and get some answers to your techie questions. I did promise you a picture of sheep' so that is one of my lands and my lovely ewes. I think you'll agree, rather rather, beautiful. Thank you so much for your time today. I hope you've learned something useful.