

## Alyssa: Workflows

Kirstin: Okay everyone. We are back from our break. And oh my gosh, I'm just so excited about all the amazing speakers we have had so far. This has been so phenomenal. So next up, we have Alyssa Lang. Alyssa is also known as the Workflow Queen, and she teaches bookkeepers and accountants how to utilize tech and automation to create better workflows, systems and processes for their practices.

Kirstin: After being in the accounting world for five years, Alyssa struggled with streamlining her practice. She felt frustrated and nervous and couldn't sleep at night, not knowing where her client work would come from. She was overwhelmed by all the daily tasks, lost track of work and just couldn't keep up. I get it. I get that same... I feel you.

Kirstin: Alyssa hit a wall and decided to make a change. So, she started to automate her practice by creating workflows, systems and processes. She was then able to run her practice and take on more clients to scale and provide excellent service in the process. These days, Alyssa is a full-time educator. She's also an Asana Certified Pro, and her courses and resources have helped hundreds of bookkeepers and accountants worldwide. Welcome, Alyssa.

Alyssa: Yay, I am so excited to be here. Thank you so much. I hope everybody can hear me loud and clear. I am honored to be here today and I can't wait to dive into workflows and all the fun things, and also be able to guide you and lead you on how you can actually create a more efficient firm for yourself.

Alyssa: So, let me get this amazingness ready for you. Of course, it's asking me to give permission. Sweet. Cool. Let me make sure I can share my screen real quick. I'm getting you guys my screen. Okay. Okay. Give me one second. It won't me want to share my screen? It's not letting me. Why is it not letting me share my screen? There we go.

Alyssa: Okay. So hopefully everyone here can see my screen perfect. So, I'm going to get these slides ready to rock and roll. Cool. So, we're talking all about workflows today. And this is what's really, really important, is we need to tackle this because it's important to efficiently run your firm, and also to better serve your clients. So, we're going to talk about how to actually get a grip on your practice through your workflows and your system.

Alyssa: So, if you don't know, after the great introduction, my name is Alyssa Lang and... screen... I'm having tech problems today. I'm a bookkeeper and tax repairer turned to Workflow Queen, a certified skydiver, fun fact. And I love to nerd out over tech and systems. Like Kristin had said, I have been doing this for about five

years running my bookkeeping and tax practice. And it was a struggle for a really long time to actually simplify things and get things working correctly and smoothly running behind the scenes so I can efficiently serve my clients. I'm on a mission at this point to actually help bookkeepers and accountants from around the world to implement these systems and processes so we can better serve businesses along the way.

Alyssa: So that's what we're actually going to be talking about here today. We're going to talk about what workflows are and why these are actually essential for your success. How to create better workflows and systems that will allow you to get more done in your bookkeeping practice? And how to further organize your client work through proper systems and processes. And we're also going to bring you that clarity on how to start working on your practice versus in it.

Alyssa: I know a lot of you can probably relate that we typically become these task rabbits, and we're constantly doing all these little tiny things, but we really feel like we're never actually moving things forward. When you start to implement these systems and processes, it really does bring us to this place where we can finally start to work on bigger and better things because we're becoming more efficient and saving ourself time, and also reducing our errors.

Alyssa: So now let's dive into the nitty-gritty of the reason why I'm here today, which is all about workflows. So, first, before we dive into how to actually create an efficient workflow, let's talk about what a workflow even is. Workflows are a process and a process is a series of steps that ultimately accomplish a very specific task. Little do you know, we actually all already have workflows, whether they are documented or not. You just might not realize that you actually have some workflows, but we're going to give you some aha moments today.

Alyssa: So, what actually makes a workflow successful? It must be systematically organized and repeatable. Literally, if your workflows are not working for you behind the scenes and also helping to guide you to make sure you're not wrongfully doing something or you're missing a step and it's not repeatable, then it really isn't a successful workflow. But today we're going to actually talk through what that actually looks like and how to build one out. So, creating these workflows that are successful are going to help you to save time. It's going to help you to easily outsource if you do have a team, or you have intentions of actually bringing on team members later. Also, this will help you to reduce your errors in the work that you perform.

Alyssa: So, let's talk about why our workflows are so important. They can really truly allow you for a much smoother workday, I promise you that, and give your clients and your staff a very clear picture of what's expected of them. This includes a clear understanding of when things are due, how they should be

delivered and each step to actually make it happen. I can't even tell you how many times I've had so many different types of clients or any of our contractors that have worked for our firms really just love the fact that we have all these different workflows and systems and it truly has made it so much easier for me to say, "This is exactly what I'm going to need from you. Here's a list. Here's how I want it done, and here's the expectation from it." Workflows are crucial to actually being able to consistently stay on top of your work as well.

Alyssa: So, let's talk about when there's no a system in place because a lot of the times, a lot of bookkeepers and accountants who do come to me for some advice on workflows and systems, they typically don't even know how to actually implement it. And that truly is such a struggle, I have totally been there, so I get it. At one point, I was definitely not the workflow queen. So, when there's no system or workflow in place, we tend to just do what we think we're supposed to do with no clear understanding of the end goal. So, a lot of times you feel like you never know that you're actually done with a specific task, or with that onboarding, you constantly have this nagging feeling that I forgot to document, or I forgot to ask for the statements or whatever it is. If you clearly define all those things in advance through a system or through workflows, it makes it a lot easier for you to stay on top of it and know and have that satisfying feeling that you completed the thing.

Alyssa: It can also cost you money and your time. A lot of times, this clarity moment doesn't come until after you implement a system. You don't realize how much money and how much time you're actually losing by not having a system in place. And typically, we're just told we need to hire someone to come help us with these different things. The problem is, that person might not even have clear expectations of what you need. And therefore, they're going to spend way more time on a task, and ultimately, costing you more money. So, it's crucial to understand that why if we don't have a workflow in place, how that can really affect you in your business.

Alyssa: You and staff could be literally spending hours a day waiting on what to do next, which nobody likes to wait around for their boss. You don't have any... You have more time that you're spending because you have no clear understanding or guidance or you're leaving no extra time to gain or network with for new clients. A lot of the times you're stuck doing things constantly. You're using your mental energy. You're just so exhausted. By the end of the day, that you don't even want to think about talking to a prospect, or having to pitch yourself. So, when you start to implement these systems, you will be able to have that extra time to therefore bring in some more clients that will support the lifestyle you want.

Alyssa: When there's no system in place, you'll spend hours each week just going by what you remember, when instead of having it clearly defined and laid out,

which makes it easy for you to tackle everything. Even when I have crappy days where I don't feel good and I really don't want to do the work, I know that all I have to do is not even use my mental capacity and just sit there and follow a task list. And it works out like a charm.

Alyssa: So, I have one thing I want to ask you. If you were featured on Oprah today, would your firm be able to keep up or would things fall apart and would you lose control? And a lot of the times this answer is going to be, you don't have this and you could not take on that extra capacity. If that's how you feel and your firm could not handle an influx of new clients, there's probably some break in the system and probably you would need some more people on the team to help you out. The problem is, when you hire new people to handle an influx of clients, and you don't have the proper systems in place, things will crumble and it will not turn out good.

Alyssa: So how can we take the things that we do and create a workflow out of it? Think about the steps you take to literally do anything in your practice, and I mean anything. Begin to list out, or even record yourself via tools like Loom, or you can document things to Google docs. You can use a project management system like Pixie, ClickUp, Asana. And while you're already doing the thing, why not take the extra time to actually record yourself doing it? And like I mentioned, Loom is probably my number one favorite tool, and it makes it really easy for me to send over a quick video to any of our team members. But remember, as you're doing the thing, don't just get stuck, constantly being like, "Oh, I don't have time. I'm just not going to have time." If you sit there and record it now, later you will thank yourself for that one recording or that one document, or the way that you had listed out all the series of steps.

Alyssa: I challenge you to try to extract at least one thing out of your head about a process as often as you can. One of the reasons why we typically don't end up hiring any contractors or people to work for us, is because there's this nagging feeling that there's no way someone can do what I do, that I'm special, and that I'm smart and I know how to do all this. That is absolutely true, you are smart, you're beautiful, you're amazing, but the problem is, you're allowing yourself to keep everything in your head. We need to take those things and put them somewhere that can be easily repeatable and passed onto somebody else. If, God forbid, someone was hit by a bus tomorrow, or we were hit by a bus tomorrow, you need to make sure that someone could pick up where you left off easily. And that's where systems really do come into play for all this stuff.

Alyssa: So, let's talk about a couple of examples of workflows that maybe you just don't realize are actually workflows. Onboarding your new clients is a really big process and also the workflows. And I see this being a daunting thing for a lot of different bookkeepers. Performing your diagnostic reviews for your clients,

onboarding new team members, paying invoices for your clients, managing the monthly day-to-day project of your bookkeeping clients, or even consulting clients, tax preparation. For those of you here who also do tax prep, that's a whole workflow and a whole process.

Alyssa: Even coming down to your sales pipeline process, that alone is also a huge piece where a lot of people end up falling... All your prospects fall through the cracks. If you don't have your sales pipeline, workflow process like documented and ready to go, a lot of the times we don't end up reaching out to prospects and gaining new clients because you can't even remember when the last time you followed up with someone or what that next step you should take in order to get on the phone with them. Even down to your monthly check-in calls, that's its own series of steps that you have to go through in order to prepare yourself for these monthly check-in calls.

Alyssa: So, let's talk about understanding what makes a workflow successful. So, we know what a workflow is, why we should have workflows, a couple of examples of ones you may already have, and also how you can start, recording them or documenting them or putting them somewhere, but now we have to talk about how to make one really efficient and make it successful. Workflows can literally be traced back to Frederick Taylor and Henry Gantt, who are two men who are on a mission to improve their production through systematizing their work.

Alyssa: There's three main questions that you should be asking yourself of every workflow that you are trying to create. And that's what needs to be completed? Who needs to complete it? And how long should the workflow or task take to complete? Sometimes I have people who come to me and tell me that I have no idea how long it should take, and that's because you're not properly recording your process. If I were to sit here and document onboarding my new client and going through, I can track myself via time going through that whole entire process. And then I also have a documented. When I bring someone on the team and I outsource that whole process to them, I know how long it should take, but I give it a buffer if they're a newer team member, but this helps me to understand how much time things should take.

Alyssa: So, on top of those three things you should be asking yourself, you should also be asking or saying to start with the end goal in mind. You want to know how you're going to end and how you know you have to clearly define if your onboarding process is, that last document that your clients sends to you and also pays the invoice, we have to say out loud, on paper, recording yourself, however you want to record this process saying, "This is the end game." Like we know when we've hit this piece that we're done. So, you have to start from there and work backwards. And this will allow you to create a more successful workflow.

Alyssa: You should also be setting clear expectations and outcomes for each task. I know that this sounds like it's second nature and people should just know, but guess what? If your child couldn't even perform a task with a task list, you still have to give them expectations and outcomes of that task. You literally have to break down your workflows and, in the way, as if you were handing it over to someone who's never walked into your business to a child, whoever it is, it's important that you break it down in that style. And that's what will really help, so everyone knows what their expectations are.

Alyssa: You want to also provide enough information as possible for each and every task that's within this process or within this workflow. You also want to go back as you start to document all your processes and workflows, and you take this time, and by the way, PS, this does not happen overnight. It can take a long time for you to really nail it down. And even if you do have all your systems and processes documented, you're typically going back and you're actually updating them. But when you do go back and you have these ones documented, it makes it really easy for you to analyze it and say, "Let me trash these things. Maybe there's a way that I can automate this task." Maybe we can use Zapier to get every time someone schedules a call with us and immediately puts x, y, z, those are ways that when we start to document them, we have these aha moments of, I can make this better.

Alyssa: So, I want you to ask yourself these questions when you're actually laying out or creating and optimizing your workflows. So, as you're starting to document your processes, ask these questions, what needs to be completed? How long should the task take? What are the expectations? Who needs to complete the thing? What information is needed to complete each and every task? And what can I trash or automate to make it more efficient?

Alyssa: And my number one tip here, because I know a lot of people are old school in the sense of using pen and paper, which, don't get me wrong, could go a really long way, but at one point, when you want to scale your practice and bring on a team, or even for yourself to work more efficiently and have repeatable tasks, I highly, highly suggest that you use a project management system, like Asana, Pixie, ClickUp, there's 50 million of them out there to help you create those repeatable workflows. So, it's really convenient when we upload all of our workflows, let's say, for example, into Asana. And it makes it really easy to set things to repeat. So, when we have that project, we can just duplicate it and it's ready to go and we can execute on it. So, I really do suggest, if not, you're going to be on your piece of paper and you're going to have to rewrite the whole process every time you do it. Plus, I have a tendency to lose all my notebooks all the time.

Alyssa: So, let's talk about a visual breakdown of this process. I know for myself; I like to see things in action. So, I'm going to show you what it looks like to build out an efficient workflow, and also how to set all those clear expectations and nail those six questions we talked about. So, let's talk about, this here is our workflow that we're going to use as an example. This is called, or this task and this workflow, whatever you want to call it, is Posting Payments for Invoices. Now, this was just thrown together inside of a Google doc, but this can actually be taken and put into a project management system to make it easier and repeatable.

Alyssa: So, we always start at the first top. Right here, we have pick up our mail, all the way down to the very bottom, is filed deposit receipt and check copy with items for bank reconciliation at the end of the month. Now, if you remember, we need to start with that end goal in mind. How do you know that you have successfully posted a payment for an invoice? Is when you have that receipt and you've attached it to the bank reconciliation at the end of the month.

Alyssa: So, as we get there, we start to work backwards and make sure that we've hit every step to make sure that outcome is served. And that's what's really important about any workflow you build. For example, we can talk about the whole process of, if you want to get on social media and you want to get in front of people, now that the world has gotten more virtual and you want to get in front of your clients, if you want it to go post on Instagram, you want to make sure that you have a specific outcome. And you know that it's successfully posted and all the things are there. That's your start with your end goal. How do we make sure that this is happening and all the series of steps that we need to do in order to get there? It makes it easier versus if you try to start from the beginning, it really just makes you think about all the different steps you have to take and then you forget something. So how do we build up to that end goal here?

Alyssa: You can also see here with this thrown together. You can see that each step is listed clearly. So, it's in order. It's in an efficient manner. And also, you'll see that we have these breaks here. So, after client reviews the check, this allows you to further break down your workflows. So, we do these first four steps. Once the client has verbally approved the checks, that's when we can tackle these next series of steps. And then once the check is matched in QuickBooks, then we can complete these next pieces.

Alyssa: So, in a lot of these project management systems that we use, we're allowed to use what they call Sections or ways to further organize your tasks within your workflows. And so for myself, this is something that I typically do is, we can do these chunks of things in this workflow, but at this point, we're sitting ducks. And then once this happens and we move on to the next series of steps. So, make

sure you're starting with your end goal in mind, that each step is clearly listed out. You're not just saying like a total balance. Like you have to give it some details. So that way, if someone else came into your business right now, and they had to post these payments for invoices, you want them to have every single detail you possibly can. This is why we always recommend some a project management system is, you create these once and then you can duplicate them and reuse them. So, the hard work is front-loaded at the very beginning, but then it makes it easier as you build and you build and you work and you work.

Alyssa: You also want to see that these have details and straight to the point. These literally tell you open reports, AR aging summary for, and then you answered the timeframe. And that's a way that we can set these things to repeat. But we're still missing some of the important details to actually execute or outsources task. And what I mean by that is, you can give this to someone all day, this one little list, but here's where we're missing those other key pieces. A lot of the times we think that, oh, I know that this is the address I go to So, pick up the checks. Oh, I know what account number I have to write on the deposit slip. Oh, I know what I need to do and z, y, z.

Alyssa: We need to make it so clear that if someone he does not know how to use your software, it doesn't even know what software you use, what bank you go for your client, that they can come in and they can pick up. So, this is where we start to get even more in-depth in why and how we can actually clearly set expectations. Let those notes who needs to complete it, how long it should take, any and every piece of information they would need to give you that clear expectation, that outcome that you want from this one process.

Alyssa: So, for example, regarding this last task that we just threw together here. It says what needs to be completed, which was posting payments for invoice. Who needs to complete this? This needs to be very clear. You might not have a person's name, but you might have someone who is maybe the admin person, or the customer support person. They don't have to have names if you're not ready to bring people on, but maybe you want to lay out for yourself. So, when you're ready to bring someone on, you know that you can immediately outsources to this title as a person. How long should the task take? Here I just threw in 30 minutes, but this is really where once you start to do the process after you've documented it, you're going back and you're saying, "Okay, this is how long it's actually going to take me."

Alyssa: And before I move forward, I want you guys to know that you don't have to literally list this out just like this every single time. You don't have to write out the question of, what needs to be completed? How long should it take? These become, like once you get really good and consistent with recording your processes and all your details, you will subconsciously ask yourself these things

every time you record your process, every time you do something, every time you create that workflow, you will always have these in the back of your mind. So, these are just listed out here for this example purposes.

Alyssa: So, the next piece here, it says information needed to actually complete the task. Now, this is where I see a lot of bookkeepers and accountants failing to put upfront and what makes it really hard for them to bring on contractors or people to help them out in their business. We need to give, whoever is looking at this past task right here, every piece of information that they need in order to execute this. So, a really good example. What is the location? Tell me the address of where you're picking up that mail? What folder do you want me to store the checks in? Once you upload them online, where do you want me to put them? Is it a Google Drive link? And if it is, you have the ability to copy URL links in Google Drive and paste them directly in a supporting document that you would easily give with that process. And that's why we use project management systems because you can typically take all this information and paste it within the task or within a project and easily outsource.

Alyssa: You also want to include little tiny things like naming conventions. And I know that sounds really crazy. But if any of you here actually have your own team members, it drives me insane when they name things that I wanted it to be named a different thing, but you can't be mad at your team about the way they named something if you weren't clear about your expectations of what you want the thing named. So, for myself, we always put naming conventions for that check. So, customer name, check number, date, and amount. So, this is how we give as much information upfront because like I mentioned, you cannot be mad at anybody else who comes in and does it wrong if you didn't give them everything they needed.

Alyssa: Then you also have client check review email template. This is where we're cutting down and making things more efficient. Now, instead of always, if you have to do this whole work for this whole process twice a week, and you are going into your email, and when you email your clients to ask for the review of the checks, and you're rewriting that email, guess what? That's five minutes every time we do that. Five times two times a week. Times that by 54 weeks, you lose hours of your time. So why not instead cut down on all of these different tasks, and instead create yourself an email template that literally says like, can you review these checks like X, Y, Z, and you can always insert your email template here so then your team can use that email template and send it out. And all you gotta do is put that customer client's name.

Alyssa: Deposit slip details. This is where if you do have someone else, you're going to bring on, you want to even give them details down to link to the secure folder with the client's account number. Now, we use last pass over here. But whatever

system you actually use, it doesn't really matter, but we don't store them inside of our project management systems. We keep passwords and sensitive information inside of a secure folder. But you do want to include the client's address that needs to be written on the deposit slip. You really need to sit down and give so much detail, that if literally someone wants to come into my business right now, I can outsource this to them and they can do all the things for me. They can go to the bank; they can upload it directly to the folder. They don't have to come back to me and ask me for a direct folder link. Instead, it's all here. And they really don't have to come back to me, which is my favorite thing.

Alyssa: So next, you want to make sure you have your rules and expectations. And I know that usually people think that the expectation is to have a posted payment for invoices, but really, it's much deeper than that. If you notice that here on this workflow, I believe at the very bottom, we talk about adding this over here, number 14 says select Undeposited Funds for the deposit. And then the next step is saving close. One of the rules and expectations, and one of the most important pieces of this process is to make sure that all checks are added to Undeposited Funds. So, these are become our rules and our expectations because if you don't clearly define that, they could post it to the checking account, they could post it to the savings account. So, if you lay that out for them, it's really hard for them to not listen. And also, if they don't do it, you also can say, "You didn't look at your supporting document. You need to make sure you're following your rules and expectations."

Alyssa: Make sure all your checks are double-checked and they're matched. And also, you want to make sure that your payment details cells are listed. So, then you could lay out those rules and expectations. And also, we take checks to the bank maybe every other Wednesday, maybe once a month, however long. But if you don't even state that part, how are you going to ask someone to go and make this a repeatable thing if they don't even know how often we're doing this?

Alyssa: These tiny details seem like second nature to us and like, "Oh, I already know I have to do that." But why not set yourself up to a place if you're managing 30 clients, and you're trying to remember for what client you go to the bank on what day, you are seriously doing yourself a disservice, and you are honestly wasting your time. So why not lay it out and make it easy for yourself to even pick up where you left off?

Alyssa: Then we also have below even those as repetitive expectations. One of the main expectations is to be completed accurately and timely. Ensure that all numbers are correctly entered and double-checked, and try to do only blank number of deposits each week. So, coming back down to how many times a week. Then the last question we always want to ask, once you start to record these processes. And like I mentioned, it doesn't have to be written in a Google doc. It can

literally, you can film yourself on a screen on Loom of you doing something and attach a supporting document to it to make sure that they have all the links in the details that they need. You want to then go back and maybe occasionally, maybe once a month or even twice a month, go back and look at your SLPs and your workflows. Choose one or two and just make sure it's still up to speed. Because I can right now, especially with 2020 and what COVID had done to pretty much the world, so many things changed in the way we had to do stuff. So, your workflows and your processes could be recorded today, but then three years from now or even three months now they could change. So, we have to make sure we're staying on top of that as well and maintaining it. But usually doesn't take that long to actually you maintain it.

Alyssa: But you do want to revisit them and you want to ask yourself, what can I trash or automate it or automate with this workflow or process to actually make it more efficient? Maybe there's a lot of different things that we can eliminate by using systems and softwares, like if this are ITIF is I think it was called, and also Zapier, or how can we get into a system, or use Calendly or create email templates.

Alyssa: So, for this example here, once I'm looking at this actual workflow and it's listed out and say, we're working on it once a week and we're becoming more efficient and we're getting the hang of it and it's great, we have all the information that we need, then we start to come back and say, "Okay, I'm going to review this." And after looking at it, we can create one of the efficiencies that you can do to make this better, faster and stronger, is we can go and create that templated email, asking for the client to review checks. That can save you, let's say five minutes a week, just like we had mentioned earlier. And you can keep building that and building that. So, you're reviewing it and saying, "Okay, we can template this so that we always have access to it. And then we can just reuse it every week."

Alyssa: Another efficiency tool would be pre-fill out deposit slips a month in advance. And I know this sounds really tiny and so unnecessary, but I promise you, just writing it because I remember I had to do physical bank drops as well. Writing those out can take one minute, but that one-minute times how many ever weeks in a year can truly add up. So, batching out your work, and this is where we love to batch out stuff. We'd like to do things all at one time so we're not tasked switching. Go in and just five minutes once a month, write out all your deposits live for the next two months. And then you don't have to stress about it. That that step will be eliminated. And you won't have to worry about it so much.

Alyssa: Another thing that you can do here with this example is reduced the number of trips to the bank, unless the client asks otherwise. Sometimes we have no control over how often we can actually do things if they need us to go to the bank every day. It is what it is sometimes. But maybe having those conversations

and saying, "I don't think it's necessary. We don't have a high enough volume of checks."

Alyssa: So, these are ways that you can go back. Once you list out your details, you start to work with these workflows and these processes, and you become more efficient and you get the hang of it, and you're doing maybe one workflow, you're recording once a week, or once a month, you can go back and say, "How can I make this better? How can I make this faster? How can I make... How can I reduce the errors in my workflows and be able to save me time? All these time savers that you're doing by creating these extra efficiencies, can literally leave you room on your calendar to finally go to that BNI meeting that you have been waiting to go to for the longest time.

Alyssa: It's so crucial that you allow yourself to have that mental capacity to be present and be there when you are trying to gain new clients or you're on your monthly check-in call, or whatever it is that you're doing. You are literally not even serving yourself right if you just sit here and you're constantly trying to remember all the things you have to do, instead let's break it down and make it easy to just be repeatable and bring on someone else when you're ready for that.

Alyssa: So, breaking down your workflows with details. This will allow you to have everything listed that someone would need to easily pick up where you left off just like we listed it out real quick inside of a Google doc. You won't need to constantly remember where that link is or who's supposed to do what in the business. Instead, it's very clear. There're clear expectations. Everybody knows exactly who's supposed to be doing what. And if somebody were to quit as the customer service person, you know that anybody who says, who needs to complete this as customer service, it'd be really easy to gather all that stuff and easily hand it off to them.

Alyssa: This will allow you to reduce your errors in the way that you do the work. Plus, your team will honestly appreciate you. We are in the process currently in our business where we just hired out a brand-new team member and she's been with us for about a week. And I have been sending her videos of the yin-yang. I have been giving her processes, I have been giving her documents, all the information she needs. And she literally was so excited about how it's so easy for me to step away and for her to actually go and run with that stuff and actually complete the task without having to bother me. And it's great. It feels good for me too.

Alyssa: So that's more of motivation of why it's so important to actually record these things. Because while I'm busy here on doing this presentation, I don't want things in my business to come to a screeching halt because she's not getting an

answer to a question that, because I'm busy on a presentation. It's important that she can tackle those things. But I had to put the front-loaded information and the effort into it in order to get to a point where I can actually walk away and someone else is handling it. So, keep that in mind. When you break down the workflows in detail, this allows for the completion of the task to be reduced or automated. So, this comes back to, once you get the hang of it, you are revisiting it and asking yourself, how can I make this any better?

Alyssa: So, I want to promise you that it takes some time and motivation to actually list out your processes, but the more that you do it, and the more efficient you and your firm will actually become. It is hard. And the reason why a lot of people do not have systems and processes in their practice, is because it's uncomfortable. It's just easier for you to just do the task every single day than it is for you to sit there. It may take you an additional five to 10 minutes to actually record that process, write down all the information, but you do that once, put it in a system, set it to repeat, you never have to do that piece again.

Alyssa: So, it's hard. And it is really uncomfortable sometimes to actually put in that, but the outcome and what's going to happen on the other side of that is freedom. It's freedom from not stressing the hell out every single night, crying yourself to sleep. I went through this with five years of my practice of being stressed out about every little detail. And now I can actually stop my work when I want and not take it home with me, even though I work from home. I have to.

Alyssa: So, I want you to understand that, that it doesn't have to be the scary though. It's actually really fun. I nerd out over every time I get to record a process, it seriously excites me. And now, the best part is, after only a week with our newest team member, she is now taking her own initiative because we also have an SOP on how to actually record a process or a workflow that maybe she took on herself. And she's already jumping in and creating her own workflows for us to learn on. That's what you want. But we have to get you to that place where you're giving that information and teaching them how to effectively do that. And that's where it comes down to workflows and processes. I can't imagine being on a training call, it would take months for me to train our newest team member. And I would probably be really stressed out. And things would fall apart behind the scenes. But instead, we put a lot of details upfront. And then it's made it easy for us to not have to be on constant training calls. So, keep that part in mind.

Alyssa: I also want to encourage you to start small. Do not try to tackle everything in your practice today. Don't try to create our onboarding workflow right now on top of this other workflow and this other workflow. One step at a time will take you farther than trying to overload yourself. Record yourself doing the thing. While you're already doing it, check out Loom, it's free, and it's great. And you can seriously just record yourself while you're doing something. Go back, reread

it, grab your details and that we have all the special links. And also think about leveraging a project management system. And then this is when you have the opportunity to actually add those layers. So, you will get better, you will get stronger, you will get faster, you will reduce that time you're spending on those things. Whether you are solo or you do have a team, you will eventually get to a place where you are in a group because you know that you feel good because everything is there. So, then you want to go in and you actually want to add the layers.

Alyssa: So, that is all I have to say about workflows. And I'm going to open this up for Q&As. So, if you have any questions in regards to workflows, systems, processes, some clarification or all the things, please feel free to let me know.

Kirstin: Okay. So, we've already got a question.

Alyssa: Yay.

Kirstin: What did the CRM program do you use?

Alyssa: So, this is actually a really good question because what we typically do is, we actually use Asana. And with Asana, we have our own sales pipeline that we've created. So, we've created our own... We've built out our own project of ways that we can actually track all of our progress inside of Asana. When it comes down to the actual email itself, we are using Gmail, G suite, all that fun stuff. But essentially, anytime someone comes in for example, we use Calendly, if someone comes in and they book an appointment, we have an automation set up, and this is where we went back and efficiently worked our workflows and have that prospect added to our pipeline that we built out inside of Asana. So, it doesn't have to be Asana, it could be other systems. A lot of these have those pre-built in where you could create your own templates and your own projects. You just have to think outside the box there.

Kirstin: Okay. Yeah, let's see, someone else said, is there a practice management or CRM that syncs with Asana, but you don't sync with it, you use it? You use Asana for it?

Alyssa: Yeah.

Kirstin: Okay.

Alyssa: Yeah, exactly.

Kirstin: What kind of tasks and workflows do you have for your pipeline?

Alyssa: So, for stuff like that, usually what we're doing is, what we create is called Sections and we have it on what's called a Boardview inside of our project management system. For those of you who are here who don't use a project management system or haven't even explored, don't be overwhelmed, it's simpler than you think. We have different sections of it. So, it's like the different phases. So, for example, we have leader prospect comes in, something along that lines. Then the next phase that we have is something like reach out with to client or send them for, or whatever it is that you need to do. Then the next step is called Complete. So, then every time we have this new prospect who drops into our pipeline, we're taking that card and we're just dragging it across the pipeline to see visually where they're at. And so, then we get to the phase of, if we want to move forward with them, we then do a diagnostic review.

Alyssa: So, then they're moved into the Diagnostic Review column. And then that's when we initiate our Diagnostic Review workflow. And that's when we actually go in, we perform it. If things work out, things look great, we then come back to our sales pipeline, move them into preparing contract or proposal needs to be created. So, each piece of it, we were just dragging it through all the way down until even the sales pipeline is complete, which is usually signed, paid, and then the project is initiated.

Alyssa: So, for example, if it's a bookkeeping client, that last column would be something like project created. So, then we would drop them through. And having it on this visual board allows for us to see where people drop off. So, this helps us to determine that maybe they're dropping off because our prices are too high, or maybe we're not pitching ourselves enough on the sales call. So, if we have a column with all these prospects that are just sitting there under Call 1 Complete and ghosted, then that means that this is what could essentially be our bottleneck of what we need to focus efforts on to make that sales process better and actually land those clients.

Kirstin: Okay. That makes sense. Also, we've had a couple of questions about what the post-it notes are behind you?

Alyssa: I get this question a lot. Yes, all the time. We have a signature program here at Workflow Queen and that's actually every sticky note is a bookkeeper or accountant or tax preparer who we've impacted in our business by supporting them with implementing systems processes and all the fun things. And we help students from around the world. So, every sticky note is a bookkeeper or accountant in our program.

Kirstin: Oh, well, that's fun.

Alyssa: Yeah. Yeah, it's really fun.

Kirstin: Yeah. And what is your website? Is it workflowqueen.com?

Alyssa: Yeah, workflowqueen.com. Yes. And then our firm is Top Notch Bookkeeping Solutions, which is currently going under the rebrand, which is very exciting.

Kirstin: Oh, okay. Because yeah, we've definitely got that question. Okay. So, I just type that into the chat for people.

Alyssa: It's [https://www...](https://www.workflowqueen.com) Because I think the link will break.

Kirstin: Yeah, I'm sure it will. I'm sure it will. I was just hanging it up and getting it in there real quick.

Alyssa: Right.

Kirstin: I copy and paste myself usually. But anyway, well, I think we... I don't see any other questions. I personally learned a lot because I am, I am currently where you were. I'm pulling my hair out type of thing.

Alyssa: Yeah.

Kirstin: So, I'm eager to get all this started in my own practice. So, yay, I'm so excited that you were here, yay.

Alyssa: Yeah, it's really awesome. I think just take it easy. Everything's going to be okay. No one's going to die if you don't do a certain task. That's what I tell myself every day and it puts the pressure off of me.