



Dream of Travel Writing

Introduction to Business Systems for Freelance Travel Writers

Welcome to the introduction of our new webinar series on Business Systems for Freelance Travel Writers. I've just been looking forward to putting this together for you guys. I'm hoping that it will be very revelatory to you guys.

So the idea behind this business system series is on the one hand, the idea that you are a business and how entrepreneurship really works in such a small scale, especially with service-based businesses. I know most of you guys don't have other people that you contract out to for different bits of your work. But it's also to explore something that is very near and dear to a lot of what we do here at Dream of Travel Writing, which is this idea of how do you take big business systems, the systems that have been refined by all the academics and their ivory towers? Well, these days business schools are more likely to be beautiful glass skyscraper towers, but you know what I mean. All the academics in their big glass towers, and all the CEOs and they're even bigger glass towers, and all the consultants and all the research firms who are out there figuring out what is the best way to X? What is the best way to communicate with the client, land a client, maintain communications with the client, maintain your own liability and so on and so forth?

So throughout this series, I will be trying to as much as possible, keep the jargoniness to an absolute minimum because I don't have an MBA and I don't...looking at who's on here, but also thinking through our email list. I don't know how many people really do have an MBA that follow us, which is part of why we have this company in the first place. But the idea is that big business systems can't just be plopped onto what we do as freelancers without a lot of interpretation. I was just on a coaching call today, other coaching training call for certification that I'm getting. And they were role playing some situations. And this person was role playing with our sort of training coach as the boss and she was herself, but using some different names with the situation that she had been previously. And it was all about, you know, like, this other person always gets to lead all the projects. Everybody knows that she always gets to lead the projects, why can't we lead any other projects that I've been here a long time. I don't think there's opportunities for me. I was just listening to it. And I was like, what? First world problems? It's so interesting as a freelancer what looks like a first world problem to you, whereas then as a travel writer, we have things that other people think it was first world problems, right?

As a freelancer, for somebody who has, you know, great pay, great benefits, somebody telling them what to work on, giving them, you know, feedback, like that's going to pay them no matter what they do, is just like, how can you be complaining about this stuff, right? In a certain way, those of you who are still in other positions, I know that you would kind of, you know, gladly trade some of the foibles of the freelance world for what you're encountering at work right now. But I promise you, once you're out, swimming in the sea of having to make your own way of it, things will be a little different. So the problems, and the tactics, and the strategies that people in big business use, we can't just drop into freelancing and we can't drop into specifically travel writing, without a fair bit of filtering and reimagining.



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So what we're gonna do in this series is gonna be for each "department" and I'll talk about what those mean of your business, I'm going to break out a whole variety of things that you should or that I recommend you be thinking about, be doing, be cognizant of that our parts of your business, whether you're attending to them, or not through the lens of what a real freelance travel writing business is like. And today, since, like I said, this is kind of like a big dip into the general business, general entrepreneurship pool, I'm gonna lay a lot of the groundwork today for how we're going to be discussing these things as we go into the different departments. So particularly what I wanna cover today is, it seems like I already explained why we're doing this weird series. But I'm gonna give you some more background on that in particular, kind of how it came to me, how it's worked for me kind of the different influences that I've had that I'm going to bring to bear for you guys in the series as well. And then we're gonna look at, and I tease this a little bit in the blurb introducing today's webinar, we're gonna look at two different models. And when I say models, I don't really mean methodologies. I mean more thought models or sort of constructs to really, hopefully open your eyes a bit about how you are or perhaps in the case, aren't managing your own business.

And managing I'd use this word here very importantly. I have now got, I guess, five maybe more than that people who work for us regularly and I've managed before in a lot of different settings. But it's really interesting how when you are in a setting where the players involved, including yourself, are all, you know, willing participants as in they need to be willing to participate in whatever is going on. Whether that's an editor to get them to assign you a story, or you know, a PR to take you on a press trip, or maybe somebody that you're working with try to get them to the shoot the photos to accompany a piece, or like I said, even corralling yourself to get your work done. It's very different managing your business, when it's all relying on this kind of rarefied air of willing participation, and no one can be forced to do anything. That's a lot of the challenge that those of you in the coaching program that we talk about a lot, but you'll see how it as we get deeper into the series, you'll see how it plays out into also kind of managing, if you will, the different parts of your personality to get the different parts of the work that's required of you done.

And then we're gonna look at the specific departments that I've selected for us to explore in this series. And I did a lot of recon, for lack of a better word about what departments, as in business divisions is also a word that's used. There's a couple other terms that are used more in general business, but what other sort of sections, or subsets, or functional roles is another common term are common in different businesses and I kind of like look through all of them, and I look through how they played out, and the different names that they're given and how they play together and separately. And I distill down a list of the ones that are not just most relevant for us, but really that paint a complete picture of what we're doing in our business. And I hope that even just today on this intro webinar, seeing how complete that picture is will be hopefully not too stressfully, but a bit of a wakeup call for you guys about what parts of your business you might be overly focusing on and how that can be detrimental to you in both the short and the long term if you neglect some other areas.



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And one of the other things that you'll hear me bring into this series that we're doing is a lot about, or that stems from coaching. And the reason for that is not just that I am now a certified business coach, I'm also working on another certification on power and influence which is very interesting and a number of things from that will come to bear in this webinar series that we're doing. But also because whether I coach you one-on-one, or whether you come to one of our live retreats where we do some more small group coaching, coaching is a part of your business, because that's how you get yourself. And like I said, not to imply too much split personality syndrome, but the different aspects of yourself that we're gonna explore later is how they translate to entrepreneurship to do the things that need to be done for your business. And so this idea of how people are motivated, and how you prioritize, and how you think about these things is really a major component of what coaching is and what coaching does. So I'm going to bring that background out for you guys, as well.

And of course, you know, this is just how long I've been working on my own in the most recent batch, but I've been freelancing and running this company for nine years now. I think, exactly today is probably the anniversary of when I quit my last job for the last time. So it's kind of apropos for us to be doing this now. So I mentioned that before we dive in, I wanted to give you not just a little more background, but grounding, and context, and food for thought on this series. And that's partially because as somebody who myself has created and grown a freelance business, I was really struck by how much of a pain in the patootie it is to run a different type of business, which is not service-oriented, which is what freelancing is. But more of an overarching business with different moving parts that also provided products that have people coming into you from the web, that have issues that you've never even interacted with them before. And so why is this now taking up your time?

For those of you who have blogs, even if you don't sell anything through your blog, you might be more accustomed to this because you have readers who are coming in kind of putting an onus on you, even though you haven't sold them anything to have some sort of interaction, answer a question for you, to be accountable for something for different things like that. But even those of you who are strictly on the freelance side, there's aspects of sort of the more business side of it that you may not have run into yet, that can give you that same sort of gobsmacked feel that I felt when I moved over into this business. And that often comes up when you are in situations where you don't have direct control of your client load. So one of the reasons that for me it was a transition was that I was really strict about how I worked for a great many years in terms of who my clients were, what are the expectations and being very sure that everything was lined up that I could fulfill that. That, you know, I had processes in place to deliver what I was programmed to deliver, what I had signed on to deliver, and so everything was very comfortable, and confident, and secure in that way. But that meant that I had created my own client relationships entirely.

So, you know, before I switched over to doing this, every single major client that I had and all my clients were giving me, you know, more than \$1,000 of work a month, they were all things that I had done myself. Either relationships I had built up through pitching and then



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doing more work for somebody and building that up over time, or something I had pitched and then landed like a retainer contract right out of the gate. That's not the reality for most of you guys and for most freelance travel writers today or period. Most people are going through, you know, whether it's third-party content engines where you might be in the unfortunate position where someone else has negotiated with the client what's to be provided. They give you some directions that might not be the best reflection of what the client wants. You do your best to do what that says, only to find out that it has to be redone, you can't be paid, the time has been pushed back whatever that is, because it's very, very far from what the client wanted because someone else in the chain screwed things up.

Or, you know, the same things happens in magazines, small and large, like on a small magazine side. It might be that, you know, you're interacting directly with editor-in-chief, you know, they're able to make decisions, they're able to assign you things, you feel very comfortable in that setting, only to find out that the publisher comes in and kind of stomps all over everything one day. And really, the editor can't do anything against the publisher, and you can do even less, because they can just replace you with another freelancer like that. Or at least that's how the publisher feels because it's the editor's job to have to do that, so it's not their problem. In a large magazine setting, obviously, this happens even more. Perhaps the, you know, you're working with a major magazine, you're really delighted to have finally gotten not only a byline, but an ongoing relationship with the editor of this top tier publication that you've always dreamed about being publishing in. You're doing regular assignments, maybe for their front of book, and the next thing you know, maybe your editor isn't gone, but their editor above them is gone, or the founding editor of the magazine is gone. And now everything is gone pear shaped. Nobody knows if their job is safe. They won't take a risk on anything. They don't know what to tell you, because they don't know what they're gonna be publishing tomorrow. And your stability has also gone out the window.

So there's so many different sort of stages that people's businesses can be in, but at the same time, part of the idea of business is that you provide something that people buy. And that means you're also relying on what's going on with your clients' businesses. So there's a lot of uncertainty in this world. And, you know, I think maybe I wasn't so clear on what a huge issue this is before I started coaching people. But if you spend any time on Facebook groups, or hang out with other writers, I'm sure you've noticed that uncertainty in general, questioning of oneself, and one's abilities, and whether we're doing the right thing out of all of the many, many options we have to market and put together our business, our approach, how we do our work or to maximize our time is a huge sticking point for freelance writers, especially in travel, where dazzling destinations kind of hang outside your consciousness beckoning you to go explore because we all really wanna be traveling more than we wanna be working usually, to be honest, right?

So in this setting, the more certainty you can have, the infinitely better you will be not just because you are better able to provide for your clients what you have told them you will deliver. And like I said, sometimes you're providing something for a middleman and that can



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run into issues on the line anyway. But you will also be more secure in your ability to get new work, to know that you can manage your schedule to complete the work that you have assigned, to know that other things like paying your bills or being able to actually step away from your email on a vacation are certainties rather than things you have to constantly let the back of your mind be cycling about. So this idea of certainty seems like something that's very difficult to come by in this profession. And the best that we can do is to be certain about what we are doing internally for our own systems. I'm actually gonna go back a couple.

So the title of this webinar, introducing this new series that I've been talking about the business department series is on systems because really, as we look at everything that's going on, in each of these "departments" or functional roles of your business, it's really all about systems. Now, systems sound boring, I get it. Systems sound like, you know, machinery or something like that doesn't involve humans. They particularly feel like that, they feel like something that sucked, you know, maybe the life and the creativity out of something. Well, I wanna tell you, and I hope I kind of alluded to this earlier, that the beautiful thing about systems is that they if not automated, at least give a flow in a logical sense to other things, to free the both conscious and subconscious parts of your brain, to be more creative. To have big ideas, whether those are ideas for stories that you're already working on, or for new stories, or for an adventurous trip that you wanna take and to make this happen. And to have more of a state of flow where you can produce your best work. Because I don't know about you, but that's personally kind of like the thing that I care about the most is producing the best work. Being able to produce the best work, being able to give the most that I can to every single thing that I'm doing.

So even though systems don't seem sexy, let me tell you, they are literally singularly the difference that I have seen over all the years of paying attention to these things, between the people, whether it's a blogger, or a freelancer, or somebody in a different field entirely, who grow from being an entity on the hamster wheel, to a thing. To a business, to a force, to a sense of stability, it is systems. So while, they may not seem sexy, if you're a person who needs to be excited about things, I recommend you find a way to make them so because that is the difference. Okay? So first and foremost, before we get into talking about what systems specifically are, what they mean to us, what they look like, all these things I want to talk to you a little bit about mindset. I know we talk about this a lot, particularly with people in the coaching program, but I'm gonna talk about something a little different today than I usually talk about. This is gonna be not mindset in a how do we relate to editors, or anything at all related to freelancing way. It's more sort of general mindset for the entrepreneur, for the business owner.

Now, let me know in the chat box those of you who are graciously and delightfully here today, I love you all, whether you even once a week, we'll go with once a week, whether the thought process passes through your head once a week, not that you work for yourself, okay? Or that you are freelance or any untethered type thought like that. But this more proactive, positive, creation-oriented thought of I am an entrepreneur, or I own a business. Let me know



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in the chat box if once a week, at least or, you know, something along those veins, you have that thought kind of pass over you that you are a person who has created a thing. An entrepreneur, you know, I didn't look up the definition of it before this webinar, even though a lot of what we're talking about or that we will talk about down the line comes from some seminal books on that topic. But I'd really be curious what the etymology of entrepreneur is because entre is usually between. And I don't know the Latin root of that pren off the top of my head, but eur is usually like a person who does a thing. So I'm quite curious what that means.

So Lindsay says yes, once a week. Now, I know that I said here, do you think I am an entrepreneur or I own a business? And the idea behind the way that I framed these two questions, is that like I said, it's not that untethered or slightly negative feeling of I'm freelance, or, you know, I'm independent, or I work for myself, which implies a lack of something else. But more a sense of pride in proprietorship that you are creating a thing, building a thing. It's not just your writing, but it is also a suite of systems, there goes systems again, right? But it's also a collection of processes that run that allow a thing to run. And that thing is your business. And that thing is independent from you. So there is a book called, "The E-Myth." And we're gonna look a little bit more deeply about this, but I just wanted to let you guys know where this comes from. So the book is called "The E-Myth."

I have, I guess, maybe I haven't read the original. I don't know if the original is still around, or if they only have the kind of new version now. But I'll tell you the three books of this type in the series, if you will, that I have read and why. So The E-Myth books are, like I said, relatively seminal in terms of owning one's own business. And they're not, like they're not fancy in a lot of ways. And sometimes, you know, and I say this lovingly, they can be a bit sort of random, or rambling, or something like that, or they can seem a little, you know, big picture in a way that can be hard to follow. But that's because they're really conceptual-oriented books, where they really outline something that Michael Gerber who wrote that and I believe he has a consulting company, started around this, noticed was holding people back with their businesses. And so he's really looking to describe, and teach, and get people to be aware of something that's a little bit intangible, which is, what they're missing, what's keeping them from running their business, perhaps as they should or as they'd like to or to achieve the success that they would like to achieve.

So the three that I've read are "The E-Myth Revisited," "E-Myth Mastery," and "Beyond the E-Myth." now, I won't necessarily tell you that one of these is better than the other, they're all quite different and they serve different purposes. And they seek sort of like Marie Kondo's litany of books, to explore a concept in different ways, to speak to different people, let's call it. But I will say that if you want to have a look, "The E-Myth Revisited," I believe, is kind of the first one of this thread that you should start with. Now, to boil it all down for you, there's two modules or frameworks, if you will, about business ownership that I'm pulling from this series and also particularly the second one. A lot of others do as well, but this first one I wanna talk to you about is from the series that I wanna speak to you about today. Now, the



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first one is up on the site right now. It's this idea of the three business owner personalities, they call it in a way in some blog posts in their site, but in their book, they look at it a little bit differently.

So the idea is that as the basis of this whole E myth concept now, E means entrepreneur. So the idea is the myth of entrepreneurship is what this guy's concept is based around that entrepreneurship is a myth. Seems kind of like okay, well, then how are you telling us to do it right? But he's more talking about how people get into being an entrepreneur is a myth. And he talks about this idea of the entrepreneurial fit. And what he means by that is that people don't necessarily get into this. This meaning entrepreneurship of any type running their own business enterprise, you know, even non-profit. Knowing what they're getting themselves into, it's very common to hear people who do, you know, things of this nature, you hear it from people who've gone to law school all the time, for instance, that if they knew what they were signing up for they never would have done it, right? How often do you hear that?

Now, this thing with entrepreneurship that he says is basically that, you know, a person is going along, living their life, and then there's this idea, they have this idea whether it's an idea for a business or an idea of independence or something. There's this idea that takes hold of them and this fit. That's what he means by fit. And this idea is so strong, and so pervasive, and so powerful that they invest, whether it's time, or resources, or letting other resources go, whatever, that they invest heavily in this dream, and this fit, in this myth. And then at some point down the line, they find themselves in the midst of it, in the midst of all the things that go into actually being an entrepreneur. And they're like, "Oh, my God, what's going on?" And it's like, they wake up from this fit that they were in, okay?

Now, that's the basis of his entire idea of the E-myth, but I wanted to talk to you right now, and interestingly, I didn't notice until I put them on the slide because I don't think he looks into this. But the three sort of facets of the business owner that he talks about spell out EMT, which I think is like a subtle message for all of us, right? About being saved from this fit of entrepreneurship, but I'll leave you to think about that yourself. So he says that as you wake up from this fit, you settle into different modes of running your business. And there's three different types. Now, I'm gonna explain to you what the different types are actually starting at the bottom, because I think that's where a lot of, not you guys specifically, but a lot of writers tend to live. So the technician is not meant in a technical way. The technician is meant to be the person who is focused on the craft, the person who wants to create the best product, the person who is focused on, you know, for lack of a better word, doing the work, the actual output, okay?

Now, that might mean, you know, if you haven't landed assignments yet, that you're like constantly worrying over making the best possible pitches. You want them to look the best. You want them to be the best fit for the magazine, you want them to sound just like the magazine, you read 20 issues of an outlet, before you even put together a pitch and then by the time you've read them all you've convinced yourself that nothing is right and you don't do



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any work. Or that can be the person who, you know, is adamant about their hourly rate while making sure that they are satisfying the needs of other clients and putting together the best pros. They're really into the work in one way, shape or form, whatever the work means to them. Now, when I say they're really into the work, I am implying because that's what Michael Gerber implies that there is a bit of a savant dissociative syndromes type focus on the flow of doing the work. They can sometimes ignore the management of the situation and maybe the management of the situation is deadlines, or getting together your photos to go with the piece, or getting your interview set up, or managing your invoices, or managing your schedule generally, or making sure that you take a shower, brush your teeth, and eat your food. Whatever that is. But that oversight, or administration, or managing, or planning, or organizing aspect, that's the manager.

So before I did this, I had a full time job, which of course I've mentioned before at a university, but I also had a second relatively fulltime job, which was that I worked in the theater. I used to be a stage manager. And in theater, there's a very clear and striking dichotomy between the director, who is the creative person, and the stage manager, who in many ways and particularly wants the show open is the one who's actually in charge. And it's interesting, and they have a great way in theater over time that they've honed this division. But when you work in a professional theatre setting, as opposed to, you know, a school theater setting, which some people may be familiar with, or maybe an amateur or community theater setting, it often seems more like the power lies in the director, but that's because the director is often doing some of the roles of the stage manager. In theater, the stage manager makes a lot of decisions, which I think a lot of people don't realize, about who to schedule when, what's the best way to work through the scenes? How much time should be spent rehearsing each scene, and a whole litany of other things, you know, especially as you get closer to production.

And as a stage manager, I also had to run a meeting every night before the show opened. So I had one show, this award winning show that we worked on that ran for, I don't know, three, four, five weeks, something like that. We did quite a few shows a week, I think we were only dark, which means there's no show on Monday or Tuesday. So Wednesday, Thursday, Friday, twice on Saturday, maybe twice on Sunday, where they're doing our shows. So before every evening, and people would trickle in, they'd start doing their warm ups or whatever, you know, weird things diva actors do to get ready. La, la, la, la, you know, weird stretches, yoga, tango, whatever it was. And then I would corral the 40 odd dancers and backstage people and actors, and we'd have a meeting and I would go through all sorts of stuff. And it was my job to know every single thing that was happening. I had to put out a report about it every night, I had to report if there was a button off of a costume that needed to be redone. You know, if somebody complained about the heat in their dressing rooms, I was the center point of all information.

Now, as freelancers, we are all inherently forced to be the center point of all this information, but we do different things with it. You know, I've worked with a lot, a number. I don't know if



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I wanna say a lot. But I've worked with a number of writers, as a one-on-one coach on their business. And I will definitely say that people take to this manager aspect very differently. Some people are organized to the point of being so organized that they might be neglecting some of the creative work. And what I mean by that is that they are in love with the organization, they're in love with the spreadsheets. There's some, I bet one of you on here knowing who's on the call today, but one of you knows what this is. But there's some table-oriented new app or something that's come up that people use instead of Excel to make these elaborate tables for themselves. I don't know if anybody on here knows about this, but, you know, I've seen people who we talked about pitching, and they show me all of their beautiful organization. And then I ask where they work, the technician aspect of it, the actual sending out of the pitches, the grunt work, if you wanna call it or what have you. I ask where that is and the answer is nowhere, because they're more managers.

Now, I'll explain why being one of these more than the other is not a bad thing in a minute. So don't think that I'm taking this as an admonishment, if people are more managers.

Air table. Yes, Mackenzie, thank you so much. And I thought someone had mentioned it recently. I think it was you on our call. Thank you for that. I'm curious to check it out someday without falling down the rabbit hole because, as I mentioned, I'm really a manager at heart. So the difference though, between the manager though, and the idea bomb dropper, as you may have heard me say before, or the visionary is the space between this entrepreneur and the manager. Now, Mackenzie, who's on the call, I know we just spoke recently, I won't give away too much, but we spoke recently about how she was, you know, doing a slight bit of if you wanna call it procrastination, but you could call it airing of her creativity, to think through a lot of different business ideas recently, and they were actually quite good. And, you know, she's gonna, I hope, pursue some of them.

And the entrepreneur is that type of person, they are somebody who goes around and they can't help, but see the kernel of something that can, you know, with an appropriate, you know, fanning of air from the bellows develop into a beautiful full-fledged idea, or business, or article, or something. The entrepreneur is the person who looks around and sees the seeds that are under the ground that most people don't have that extra vision to see, but not just as the seeds, but as the flowers that they would develop into. But they're not the technician. They're not the person who's gonna do the work to make sure that those flowers grow. And they're not the manager. They're not the person who's gonna decide what is the best spacing of the rose to plant those seeds in so that you get the most delightful landscape. Or what is the best timeline to plant those seeds and to make sure that you have flowers all year long, that's the manager.

So I hope that small garden analogy has helped you see kind of how to create something, in the case that I just use a flower garden, you need to have all three. If you just have one, you'll have, you know, a beautiful something, whether it might be like some beautiful work being done, but maybe it's not the best thing. Or, you know, it's just the thing that the person picked



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up, you'll have a beautiful plan that will never be executed, because you have a beautiful idea that doesn't even have a plan attached. But it's so beautiful, this idea of the entrepreneur can explain it and sway hearts and minds with the beauty of this idea. Okay, so those are the three according to the E-Myth, the three sort of if you wanna call them maybe the functional roles, or aspects, or personalities, or, you know, we could say that all entrepreneurs have split personalities. But those are the three warring business owners inside of everybody who has this entrepreneurial fit, and goes off and creates their own business.

They wouldn't get anywhere if they didn't have that technician to actually do some of the work sometimes that was sold to somebody that allowed them to actually have a business. They wouldn't get that work out there if they didn't have the manager who actually made sure that things are getting done. And it wouldn't get bought, nothing would happen if the entrepreneur didn't know what was the right thing, the thing that would interest and delight people to do in the first place to pass on to the manager and the technician. I told you, we're going to do about two different frameworks today for thinking about your business. And interestingly/ironically, you'll see that they have only kind of, you know, secondary or tertiary connections to what we're doing with this department model, but that's because, like I said at the beginning, you need the grounding in these frameworks to understand where we're going.

So I tell you this about the entrepreneur, and the manager, and the technician. So you can understand as we go through all of these different sort of job roles, or functional roles, or business departments as you will, as we go through each of these, your affinity or aversion to them, likely plays strongly back to where they fit if you were to sort them out into these three types of work, okay? So we tend to, like I said, you wouldn't have actually gotten going as a business if you're only one, right? Those people tend to remain employees so that other people can be paid to do that bit of work that they're not doing. But we tend towards one. Sometimes we tend towards two. A number of us are great in all of them, but we still have one or another that we would prefer to be doing. Sometimes that can change based on your different seasons in life, right? Like, you know, I think I wrote about this in the webinar recently, but I used the Isabel Allende model that in the winter, as someone recently said on a coaching call, you know, when things are sort of scarce, and sparse, and, you know, there's not a lot of light and energy that's when I am the technician. That's when I sit down and I focus and I do big books, or projects, or, you know, write a whole at home program or something like that.

There's other times when I have to be the manager. I'll just take, you know, like a week or two at a time and just do a ton of organizing. I'll plan all my trips for the year, all sorts of stuff. And then there's other times when I have to be the entrepreneur, and I have to just kind of like free my mind of everything else and just have big ideas, okay? So we all have to do all of them, and you have some ability, at least if not affinity, for all of them. I promise you or you wouldn't even be here listening to this right now. But it's important as we start talking about the different business departments to feel and listen, particularly listen to yourself, when you feel that affinity or on the flip side, when you feel that aversion to different types



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of work, intrinsic to running your business. Because it traces back to this. It traces back to the three different business center personalities. And you can tell yourself, well, I have to do my taxes because I just have to do my taxes.

But if you can tell it to yourself through the lens of, you know, doing my taxes is such a technician thing, but not about words, about numbers. And I'm not a technician when it comes to numbers, and that's why I hate doing this. And it kind of, you know, you understand it more, I don't know if it will make you do it more. But then what you can tell yourself as a manager is, hey, my technician self really hates to be a technician with numbers, it prefers to be a technician with words. Let me tell the entrepreneur, the idea side, that we have a problem here because this workflow of, you know, forcing all the taxes to be done last minute or my expenses doing at the end of the month or whatever isn't working. And I as the manager wanna have a better and more harmonious system. And then your entrepreneur can come in to save your technician and say, hmm, a technician hates numbers, but this has to be done. Like what's the most beautiful solution I can come up with here, okay?

So once you start kind of looking at these different hats, not just as buckets that you may or may not fall into one more than another one a different time, but see them as kind of working together and as this tripod that supports each other. And as a system well, as a triad without which nothing really can move forward in your business. You can't do it is only the technician or only the manager, or only the entrepreneur. That can also allow more beautiful solutions or, you know, more harmonious or whatever solutions to different issues of affinity or, you know, like, you know, over affinity or over aversion that you're running into where you're not doing too much of one thing because you're just too enamored with doing another. When you start to kind of run them through each of these different frameworks it can help you to find better solutions for yourself.

Now, I said that we're gonna be talking about these functional roles or business departments. We're just gonna stick with the word business departments for now. But as we get into talking about each of these things, I'm gonna tell you in a little bit what each of those things are. It's important to begin by thinking about what you're actually doing for each of these now. So like, if I sent to you, you know, like accounting, you're probably gonna have some idea of what you do or don't as the case may be, like in my case. What you do or don't do for that area of your business now in terms of the role, right? You can probably kind of know to yourself at some point I have to do my taxes. I hope that you are, you know, being clever enough with your research that you're not actually having to pay the government for your business at this point. But either quarterly you have to pay the government money, or at least once a year, you have to pull these numbers together for your taxes, you know that you need to be tracking, you know, your mileage, your cell phone bill, your internet bill, you know, what percentage of your home counts as your office. You know, like your expenses for...if you're having a meeting with somebody, like let's say, you and I meet at a conference and we have lunch, you know, that counts as a meeting.



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You know, on some level, the different things that go into that. You kind of know because you have to do it eventually. What are the different tasks that go into doing that at least tax accountant part of your business? But when what about the other side of your business? Do you actually, you know, have a list somewhere or whether in your head or externally about all of the different things that you do for your business? Like, if you had to hire somebody to replace you, which obviously wouldn't make any sense because all of our businesses are very much a mirror of us. But if let's say you were going on maternity leave, or I don't know something like that, and you were going to bring in another writer that you knew to take over all of your work for short time, which might have ethical issues and whatnot. So this is a very made up scenario. What job description when you write for that person? What are all of the things that go into doing your job?

Now, I bet there's a lot of silence systems, meaning things that you do in a repeatable way that you maybe don't think about doing in a repeatable way. Maybe it's a way that you do things in the morning kind of that you process out emails, or interactions with clients, or something like that. Maybe you have a silent process for how you go about setting up all the interviews and other research you need to do for pieces for your regular clients, where it's really kind of an automatic system that you fall into as soon as you get an assignment. You probably have different things like this, where if you thought about it, you could sit down and write out the tasks. But I wanna challenge you and we're gonna flip over to a PDF for a second. Let me just make sure it's on the right page. I wanna challenge you to think about the idea that you're...okay, got it. Okay, let me open this link for you guys. That your business actually is not just you, that your business is made up of many different yous, that each are sort of different employees, so to speak, who have different roles, and each of them has a job description, okay?

So in and I couldn't figure out which of the three rather long books this was in. In the E-Myth books, there is one really lovely section where they talk about a business that started by two gentlemen, I believe it's supposed to be two brothers, okay? And as they started this business, they think about what it's gonna be, they think about what kind of work each person is best suited to. But they also think about all of the work that needs to get done. And they sit there and they make for themselves an org chart of all of the different tasks that need to get done for this business if they wanna start to run. I believe the example that they used in the book is like a cobbler making shoes or something like that. So somebody has to order supplies, somebody has to, you know, go deliver the completed shoes to the customers. Somebody has to man the till so that when customers come in, they can buy shoes that have already been completed, and so on and so forth.

And so they're all of these kind of different roles that work in this "cobbler company" that they do. But then they do something really cool in the book. So the, you know, we've got this whole cobbler metric going along, okay? And then what happens is, as they're talking about the different roles, and they're talking about the brothers, and they're talking about which brother is best suited to do what and, you know, maybe this brother is actually better at all of



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these things. But it doesn't make sense to have him do all of it. So they say, "Okay, well, you know, this brother is gonna do this bit, and then just to give him a little bit of relief, the other brother is gonna do this." What they do is that they sign position statements. And I'm just trying to pull this PDF for you in the background, sorry. They sign position statements for each of the roles in the org chart that they have created. So, all right, here we go. I got it now.

So let me show you what this org chart idea looks like because I've got one for us, but because we do a lot of different things like the travel magazine database, which means writers, and all this stuff, it's not gonna look quite the same as one would look for you guys. And let me flip over. The idea that we're gonna explore as we get more into the different departments is going to be how you flush out your org chart. So don't feel like you need to sit down after this call and create one right now unless you want to. If you wanna create one and then add to it as we go along, that's absolutely fine and great. So okay, great. So you're seeing this now. So this idea of the org chart, I think we're all familiar with if we've been in some other roles before. If you haven't been in some other roles the idea is, you know, this big box at the top would be the boss person, and then these are the people who report to the boss person, and then there's people under that.

So you know, let's say in this case, right? They put the president and some people under that, lead generation, lead conversion, market development, this is great. And I will use this for us because we all have these roles, even if we don't think about it, okay? So you are a freelancer, okay? Now, one half of your personality, okay, is the president and chief of your business, all right? But a big part of being a freelancer is getting the work to come in, right? So that's these different aspects of lead generation. Lead generation is having leads come to you. So if you think about lead generation for a freelancer, that might mean, you know, maybe your social media, you know, making sure that your LinkedIn profile is updated. That also might mean applying to job ads that you see listed. It might also be the cold emails that you're sending out. But also there's this role or, you know, that if you want of lead conversion. I know this is the part everybody hates, but this is closing those deals. So this is when somebody writes back to your email that you've applied to a job ad and they say, "Tell us more."

Then the person who specializes in conversion or the, you know, the personality or what have you jumps in. Because that's a different skill set, right? To close the deal is a different skill set than finding all those opportunities, right? So, as they go down here, and they flush that out more, you'll see, and again, we're gonna go through this as we go into the different departments. But they've got the person at the top, and they've got marketing that we talked about. And then over here, they've got client fulfillment. Client fulfillment is that technician work that a lot of us love to do and would just do if someone else would run our business for us. This is the part where you're actually doing the writing, right? You're doing the writing, you're doing the research, you're putting articles together, you're editing them, you're making sure that they look right and that they fit the speck and they're going out.



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The other side over here is the internal operations. I know a lot of you guys call this admin work, we're gonna use some different names as we go through that, I'll explore. But this is making sure that your work is optimized. I know a lot of the managers out there really enjoy doing that. You know that your books are kept so that your accounting is happening, and you're a receptionist, right? Answering your emails, okay? So I wanted to show you this. So with the org chart, like I said, we're going to be as we go through each of these different departments, you're going to start to see for yourself some different sections of your org chart that you should potentially be considering. And you're also gonna be through this series working on what that org chart means for you, in order to create this idea of the job descriptions, okay?

Once you know what the different sections of your org chart are, then it's time to think about what do the different people in those different parts, and again, "people" in air quotes. What do the different people in those different parts of your theoretical, but in reality existing org chart do, okay?

So once you know what the roles are in your org chart, then it's time to create position agreements for each of those roles, okay? I know it feels like we're going really far down the rabbit hole here in terms of stuff that you don't actually need to do as a freelance writer. But the whole idea of the series is that I want you guys to be more cognizant of what you really do need to do. And what I mean by that is some of these things you're already doing, and some of these things you might not be doing, but you ought to think about. And some of these things would actually save you a lot of the work you're already doing if you did them, okay?

So let's look at this idea of the position description. And this again, this is an example they have on the E-Myth site and I will... Let's see. I'll make a note when we get off the call for Janet to set these up for you, as well in the client libraries for those of you who are in the coaching program. If you're not in the coaching program, then I'll make sure that these get added as well to the webinars, in the webinar library if you purchase them, okay? So the position statement, as they call it in the E-Myth world, is that job description that I was talking about for these different facets of your business, okay? It's got the title, it's got the results statement, what is the result that this description or that this position is responsible for? We're talking about the example of the tax accountant before, right? Once a year or some parts of the year, some aspect of your personality is responsible for being the tax accountant for your business and their goal is to optimize or minimize, optimally minimize the amount of money that you need to send to Uncle Sam every month, every year, every quarter, while respecting the laws that govern freelance businesses, right? That is the result statement for your internal tax accountant.

And what do they do? We talked a little bit about what that is. Now, I really like what they do in the position statement here, which is that they break it up into strategic work and tactical work, right? So that goes back to the idea of the different types of the entrepreneurial hat



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you're wearing. Whether it's entrepreneur, the manager, or the tactician right here, or the sort of the technician. Now, this is a really important part that I think that not enough of us think about and that's why I wanted to specifically show you guys this position agreement guide. This is the kind of work that our entrepreneur hat does, okay? Which is to think of the quality, quantity, and behavior standards for which this position is accountable.

Now, really importantly, I don't know if you can read this because it's a little small, it says do not include those that belong on a system action plan. So that means that your lead generation aspect, which is the part of you that's responsible for pitching, you should not have some numbers in here that are your sort of quotas for yourself, of how many pitches you'd like to get out. But you can have something like, you know, responsible for generating, you know, 50% new client work every year or something like that. You can have something that's more like, you know, responsible for changing the direction of the business as needed or something like that, okay? So those are sort of some standards, right?

So then, what they do in the book that's really lovely with these two brothers, is that they have the two brothers think about the org chart. They have them look at which ones they're all best suited for. Then they split it up to make sure it's equitable. Then they write down these job descriptions for each role, and then they sign. And then they sign the manager, which means that they're often responsible for managing themselves. I gave you in the example of these folks in the book that I think it was a cobbler shop. So that means that there's somebody who is responsible for manning the till. Then there's somebody who's responsible for accounting, okay? And then there's somebody who's responsible for hitting sales numbers. But of course, these are the all the same dude in this example, so he is his own manager in these different roles.

And then what I actually think is one of the really lovely things about this model is it reminds you that you are responsible, not just for making sure that the work gets done, but also kind of for all of the things that go into that overseeing, you know, for making sure that the different "aspects" of your personality, or roles, or whatnot, have what they need to get the job done, right. How often? I mean, I wanna make sure it doesn't seem like I'm picking on anybody on this call. But I'll use my own computer and example. How often are we using equipment that doesn't help us do our job, right?

I was just telling somebody about some problems I've had with my phone, which is stupid because the phone is new, but I'm not able to use my maps. So if I had to be on a press trip, and I was not able to use maps on my phone, and it was taking me forever to get around, then my manager, part of me is keeping the technician who's on the ground, doing the research work from getting their job done. Because I'm not allowing them to have the resources that they need, okay? So it's not only important that you accept responsibility for each of your positions, and like I said, I do not encourage you to go write these after this webinar, because we're gonna look at what really goes into each of these positions and what matters for us as travel writers in this series, okay? But it's important for you not only to accept the



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responsibilities, and the standards, and the strategic work of these positions, but also to accept that you are responsible for managing that role, as well as for doing it.

Lindsay just said that she got herself a new laptop after much needed delays. Yeah, for instance, like I have three gigabytes of space left on my laptop, and it keeps crawling to a halt when I try to do things, and I need to take the time to clear out some space. And we're gonna talk about exactly that kind of stuff when we get to the IT part of the departments. So I'm gonna take that opportunity to switch back over to the slides for a second, to talk about the departments that we're gonna go through, because I really appreciate you all being here and we're at the end of our hour, so I don't wanna keep you for too long.

So let's have a look at what we're gonna be doing in the upcoming weeks of the series. I hope you're all starting to get as excited as I am about doing this and kind of see the possibilities of where this is gonna go in a not stressful way. Because I know the idea of having more work can feel stressful, but it's all really work that you're already doing, or that some part of you already knows that you should be doing in the back of your mind, or at least that you should be doing something sort of like this. And what I wanna do is I wanna clarify what that is so that you feel so much more confident that you've got this, that you are doing the work that you need to or at least you're on a path. You know what the work is that needs to be done. And you know you're not managing that "employee" properly, right? And that you need to help them do their job.

So I have split up what we're going to do into several, and when I say several, I mean quite a few different departments. And they're all kind of in these little buckets. So I'm going to go through each of them individually. The order that you're seeing them here, however, it's worth noting is not necessarily my final order that I'm going to do them in. I'm still dithering about them just a little bit because I really like things to be, you know, really building upon themselves and sort of perfectly rising to a conclusion. So I might make some changes in this as we go along. And also because nobody likes numbers, and I don't want to start with that and lose you guys. But this is the way I'm going to talk through it for now.

So this first slide has two subsets on it. One is more if you want to call it high-level forward looking definitively that entrepreneur part of the bucket. Whereas the second ones, though, also very sort of instrumental, fundamental, and the high level in terms of the way they touch your business, they are definitely more manager/technician aspects.

So the one idea, or the one sort of department, governance and strategy, this is really sort of the big picture of where your business is going. And I actually feel like it might make sense to wrap up with this at the end, because this is really in a way, like the combination of all of the little pieces of your business and how you wanna run them. Now, the next one R&D, is something that I think it sounds kind of weird we think of science when I say it. But a lot of you guys do this in different ways. You know, like, one person who's on here is working on a novel, another one...actually two of you who are on here working on novels, and you really



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ought to connect because you live near each other. And another one in here is working on a number of essays. And I know a number of you out there also whether it's, you know, the essays that you're working on or just pitches to new markets. Or maybe a trip that you wanna take to somewhere that you're trying to see, you know, if you can expand into that geographic area. So a lot of us do do research and development in different ways.

But in that segment, I wanna look at doing it not just more strategically, but also how to be more cognizant that you're doing research development and really think about what the goals of research and development are, and how to bring that into the work that you're already doing.

Now, the next few seem kind of self explanatory, but I wanna take a moment to point out the difference between finance and accounting. Accounting is technician, finance is manager/occasionally entrepreneur, okay? So finance is going to be projections, and cash flows, and things that are grounded in fact, but that are reaching, that are planning, okay? Whereas accounting is actually getting that number crunching done in a way that is not too noxious. Now, the last one on here, which I'm literally actually gonna do a whole week on even though not a whole week, a whole webinar, which seems weird because it sounds like a weird category, is about purchasing. Okay?

For all of us, not just equipment, like Lindsay was just saying she got a new laptop, but purchasing of travel, conferences, different things like that is a big question. It's a reality, what we do is something that must be considered.

And I wanna look at that as its own category in terms of how to do that, how to approach it? I've got a budgetary model around that, that we'll talk about as well. Now, the "doing" the work part, this includes some management, some technician, and tiny little bit entrepreneur, but mostly management and technician. I talked before about how I wanna draw more of a line in the sand with you guys about what you call admin work, and what is operations work. And we're gonna dig into that. And operations, we can just think of as a shorthand. I know some of you, particularly who are on the call today are very into this. Operations is really this idea of making the work get done in the best way possible. So there's like a heavy optimization component to this as well. Looking at workflows and things like that.

Admin, we'll get into what that is, but I know a lot of you guys have been lumping the accounting, probably less of the finance, but the accounting and also we'll see in the next slide, just customer service, and also probably legal and a bit of IT into that admin as well. And we're gonna pull that out and we're gonna really look at what admin means, how to kind of build that into what you do, what parts are necessary, and maybe which parts you've been spending a lot of time on, but perhaps should not. Now, quality control, we're also gonna devote a whole webinar to because for most businesses, this is a big thing. And I'm not saying that you guys don't think about quality control, I know you do think about it, and probably too much. But I wanna give you some frameworks for looking at it that can be kind



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of freeing in terms of systematizing, how you look at quality control, and what levers you actually have available to you to manipulate in that's setting.

Now HR, actually I've got a ton of ideas written down for this HR segment. I'm really excited to do this, which sounds really silly, but there's so many aspects of your Human Resource Management. So your management of yourself is an integral resource for your business that big companies like Google are doing. And I can pull from Google because my husband works there, but also because there's a really great book on how they manage and how they keep their employees, that we can translate into what we do. And that we can think of as parts of our business and perks of our business and things that our business should do to support us, rather than things that we're doing at the expense of our business, that we're stealing away from our business that I'm excited to explore with you guys.

Now, on the legal side, I'm not just gonna talk to you guys about things that you should consider in your contracts and things like this, but also some bigger picture things about how your business has been set up. And likewise on IT, I'm not just gonna talk about machines and apps, I'm probably not gonna talk about that at all. I want you to look at how IT works as a system in different businesses and I don't just mean like from the backup or tracking perspective. But also from the idea of replacements, how often, you know, what kind of responsibility do you have to yourself as a business to keep things running and things like that.

Now, the last section is the part that probably I spend the most time talking to you guys about and that is composed... I've got four things on here on business development. Now, it might seem weird that customer service is in here. But as we saw in that example that I gave earlier, customer service for us is really part of converting. It's part of closing a lot of deals in a lot of ways, or turning those deals into future deals. And so as such, it's an integral part of the cycle of developing new business for yourself. And in addition to sales, which is separate from marketing, and we're gonna explore how and why that is for those who are a little fuzzy on the difference. When you look at PR and what PR means for us as writers who don't have a book out on the market or something like that. And when I say PR here I don't mean working with PR people, but I mean the PR of ourself, and how we are positioning our own brands.

So those are the different modules that we're gonna go through.

So thank you so much, guys. Just spending some time with you guys and talking about the stuff that I've really been looking forward to sharing with you guys has totally brightened my day even though it's raining and grey outside and I've gotta go back out into the rain now. And I hope that you guys are all having a better day than me, perhaps a better day than when I first got you here. I'm excited to talk about this stuff in the future and thinking about these things for your business. And I look forward to talking more with you guys soon. Bye.