



# Dream of Travel Writing

## Freelance Business Systems: Your Technical Support Squad

Today, we are gonna continue our Freelance Business Systems series that we're working on. And we are moving into some various areas that you might consider admin. I have a webinar coming up a little bit later in the series that's specifically on admin and what we think of as admin. But we're gonna look at this week at technical support, we're gonna look coming up soon at customer service. And the idea with these is that all of the webinars in our Freelance Business Systems series that we've done so far, we've done seven, are designed to look specifically at a certain business area or department, if you will, of your business. And so we've looked in the past at finance, accounting. We're gonna look soon at sales, and marketing, and promotion.

And this week, we're looking at this concept of the IT department. But I didn't want to use the term IT because I feel like particularly for writers, we're like, "Oh, gosh, IT, that's something that I've never wanted to do in my life and hope to never have to do even for my own business." So I like to think about it for the purposes of our webinar today a little bit differently, a more in this vein of tech is something that supports you. We looked previously at this idea of human resources, and how your business can and should be supporting you as a human, and how, since you are the only human and your business, apart from your family who may be dragged into your business sometimes whether they like it or not, you have to also be doing that double duty of looking after yourself as a human.

This week, we're also gonna look at how technology is an intrinsic part of your business, whether you like it or not, and how to make sure that you are stewarding that area of your business appropriately. And I really struggled a lot with this idea of, like, I've called at your tech support squad in terms of, like, our personal name that we're going to use for this IT-type department and our Freelance Business System series for freelance travel writers, right? But as I was looking around for the seminar, I found a lot of people using this term IT. And I really struggled with it, because IT really at its core means Information Technology, so the Department of Information Technology.

But if you think about us as writers, and everything these days being digital or being at least written on the computer, so it's digital even if it ends up in a print magazine in the end, everything we do is actually information cross with technology, really like our whole businesses, right? So I didn't love this idea of information technology as a way for us to kinda rally around today's webinar. So I called a tech support. But you'll see as we get into it, I'm going to begin the webinar today by looking at this idea of what an IT department really does, as we've done in our past webinars.

And we're gonna pull out some specific sort of focal points for you to think about because as I mentioned, you know, this whole idea of an IT department, I don't know what you think about when you think about it, because today I know shows like Silicon Valley and Big Bang Theory have made kind of being a science-y person more, you know, trendy or attractive. There was a whole GQ article about, like, the allure of the geeky man today or something like this. But I don't know what you think about it. But I don't think it's something that you



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think about as kind of aligning with your business, or you wouldn't be focusing your business on being a freelance writer, right?

So I want to give you guys some rallying points to think about in terms of this stuff is really the core of my business. My whole business is information that is transmitted through technology. And these are the points that I need to think about in order for that technology to support my business in the best way. And so one of the things that we're gonna look at, we're going to explore, we'll just do like a sort of small exercise.

But I'm gonna do a couple exercises to kind of think about...or re-frame, rather, how you think about the role that technology can and should play in your business and how we need to be stewarding that technology. Because it is not only an important resource in and of itself for a business, but the way that it interacts with our most important resource which is us and our time, because there are only of you, and your freelance businesses is very important in how we use technology to expand our time. And then we'll wrap up the webinar today with that last slide I've been doing the last few webinars which is some food for thought, some important issues kind of to take with you at the end. These might be some action items that you wanna take out of this webinar. If you're someone who...I know not all of you do, but someone who at this moment has time in your schedule to introduce some new things into your workflow.

Now, this Freelance Business Systems webinar that we're doing, not just this one, but the whole series rather, is really special because I just did a blog post about this actually earlier this week. But all of these stuff that we're talking about, about how to run your business, this is, like, the core of all the things. All of the things I talk to people about all the time. There's literally nothing that I coach people on that doesn't, in some way, shape, or form, come back to some of the things that we're covering in these Freelance Business Systems webinars.

And people just don't go into freelancing thinking I need to get an MBA in this stuff. They go into it thinking, "Wow, I'd really love to not have to work for my super horrible boss," or, "I really get a lot of compliments from people about the writing that I'm doing or the photos that I'm sharing, and everyone keeps telling me that I can get paid to do this. And Gabi says there's ways to get paid to do this and I'm gonna make this happen." We don't go into it thinking that we need to learn how to run a business, but at some point, it will catch up to you. It's usually around the two-year mark, but it will certainly help you to do it earlier, but it will catch up to you if you don't understand these principles.

So with this webinar and the rest of the ones that we're doing in this series, I just wanna reiterate that what we're talking about here is the foundation. That's the foundation of how to run our business, which is the foundation for how to run a finance business, particularly travel business, in terms of all of the things that you need to think about. And this is something that at Dream of Travel Writing is really important to us, to look sustainably and holistically, I don't love that word, so I usually just use sustainably. But sustainably and sort



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of in a 360 way, your business and what could be ailing you. And so we have a lot of other services and things that we offer that expand on different things that we're talking about in this webinar. But I just wanted to thank you guys who are here listening to it for taking this time to invest, not just your time or your money if you purchase a webinar, in our resources, but in yourself and in giving yourself this foundation.

So these business focus webinars that we're doing, I kind of mentioned a little bit just now about what is the utility for you in terms of learning how to do these things. There's that looming in the distant future that there's something can go wrong, and there's a way that we can fix it if we just learn how to do it the right way. It might be that you don't wanna end up in a situation where you're out of money and you have no clients. It might be that you don't wanna run into legal issues. It might be that you don't wanna run into, you know, getting audited by Uncle Sam and owing them a lot of money. It might be that you don't wanna get behind on your invoices, and then find that you're owed \$25,000 by your clients, and you can't pay your bills. All of these different things are sort of logistical in a way, right?

But there are also things that are kind of potential things that could happen in the future. However, one of the real benefits of this whole concept of business systems that we're talking about is the systems aspect. And I feel like I try to make sure that in the webinars when I'm talking about different things that you can introduce or different things that different businesses do, I try to mention this important systems aspect, but I'm just not sure if I'm getting that system, the regularity, having a process for things and doing it the same way every time the exact best way that you've honed over time, I'm not sure if I've made that part clear enough since the first webinar, which were now several months after. I believe we started doing the series either in March or April.

And so just kind of to put that out there, I just wanted to say there's somebody who is a blogger. She has built a big business for herself. I'm not even sure what she sells these days, but I know, like, quite a while back, she was selling a course that had something to do with being a six-figure blogger. So she had clearly been a six-figure blogger sometime before that and figured it out and built up a staff for herself. And I remember seeing her speak somewhere last year, it was actually Q&A. And this topic of procedures came up. And she said that she thinks that they have like at least a thousand different procedures, or systems, or processes, whatever you wanna call it, written out for how to do different things.

Now, I tell you this because it's not a fluke. I tell you this because everyone, whether they have it written out or not for other people or what-not, who succeeds in earning money as a freelance writer, freelance travel writer over time is able to do so because they have honed how to do their work. They've honed it in a way where they are doing, like I said, the best way all of the time the same way. They have systems for how their time is used. They have systems for how frequently they check in on different things, like their cash flow. They have systems for knowing, you know, when their marketing engine needs to kick back in because they're gonna run out of work. They have a marketing engine in the first place.



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So as we look into this whole IT tech support bit today, I just wanted to reiterate for a second the systems thing. Because one of the wonderful things today is that there's technology that you as a small business owner can literally afford that is AI from IBM, that will analyze all of the information on a marketing company's website, and literally spit back at you things that you can say at them. You can literally pay for this. You can pay for this business insights tool from IBM which will literally analyze an entire website you would like to pitch for you and spit back important insights. Like, that's how far along we've come. But that technology not only exist, but it's affordable for an individual business owner. So there is just so much out there that the next issue that we get into is deciding what to do.

So before we get into, like, exactly what I teach and everything, I just wanna address this issue of overwhelm. I've seen some people do slides on this before. I've not, like, read an article about it, so I didn't have, like, handy for myself in a very easy to use sort of bookmark format, unfortunately, a chart for you for this. But basically, if you can imagine the usual hockey puck style graph, there's this whole thing going on right now about how technology changed. The rate of technology change has happened so much faster that you can look at, you know, that 10 years ago, there were things that didn't exist that are commonplace now. Even two years ago, there might be something that didn't exist that's completely commonplace and it has to have name now.

I was just watching, like, a talk show the other day, where somebody was talking about how they didn't understand that emojis could mean something else, like, have a coded language or symbolic language, besides just the picture of the thing that they represented. Obviously, the example being discussed was the eggplant, hilarity ensued. But just this idea that, you know, somebody could be so behind on something that's so culturally accepted. This wasn't the case 50 years ago. It certainly wasn't the case 200 years ago, when electricity and running water and all these things was not pervasive.

And it was certainly not the case 2000 years ago, and humanity has been on this planet for a lot longer than that. So the pace of technological changes has increased to the point where if you don't have some sort of system for keeping up with what you need to for your business, that bit of overwhelm, apart from whatever is going on in your personal life, how you manage your day with your client work, the research that you're doing from an individual article, whatever, just that technological overwhelm these days has been documented can cause psychological issues, okay?

So we hear all the time about how Silicon Valley parents are now taking cell phones away from their kids, and even having their nannies sign a contract that they won't use cell phones in the house because of the addictive power of this technology. And we've talked a lot when I talk to people either in a coaching capacity or even just generally about this whole thing of being distracted by all the different things that you can click on, and all the information out there, and everything, but it's also on the tool side. It's also on the software side. And that's a little bit of what we're gonna dig in today.



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So I mentioned tools, software. Let me get into a little bit here. I have fewer definitions than usual. Hopefully the words are a little bigger, maybe you can read them. But let's get into a little bit of the definition of what is this department that handles the technology in a normal company? What are they kinda defined by? What do they do? What are their boundaries? What is their purpose? So that we can then understand and distill out what we, as freelance business owners, need to focus on. Because like I just said, it's overwhelming.

So this first one here from Wikipedia, hence, the links, "IT management is the discipline whereby all of the information technology resources of a firm are managed in accordance with its needs and priorities. These resources may include tangible investments like computer hardware, software, data, networks and data center facilities, as well as the staff who are hired to maintain them. Managing this responsibility within a company entails many of the basic management functions, like budgeting, staffing, change management, and organizing and controlling, along with other aspects that are unique to technology, like software design, network planning, tech support, etc."

So there's a couple of things in here I'm gonna explain on another slide, but I just wanna take a second for this idea of software design, right? Like, none of us were thinking that we're gonna be designing software. I mean, I design websites, but not kind of, like, as a byproduct of what I do. Some of you might also if you have blogs and different things. But something about software design is really, really important for people who work in it. I have a lot of friends who work in the space. It's user interaction, user experience.

Now, there might be a software out there that a lot of other freelancers use. And they tell you, "Oh, you have to use..." There used to be this app I use that was for tracking your pitches. Sadly, it's no more. But like, "Oh, you have to use this pitch tracking app. It's, like, only available in the Apple Store. You can get it on your laptop and it allows you to log all your pitches that reminds you automatically when to fall off on them. You can put the response from the editor," all these things, okay? "You can even attach your invoices, you can even attach your expenses." This app really existed. Sadly, it doesn't anymore. We kinda use it, right.

So let's say somebody says that to you, though. And you open this app, and it just looks very, to you, not your style. Either it's got too many fields, and you just don't like have to do data entry of that much information, that does not excite you, or just the way that it looks just feels drudgery-like to you. It just feels like, "Oh, my God, this is just not work that I wanna do." You're not gonna use that app. That app is not the right app for you. And it's because of the design, it's not because of functionality. So I just wanted to introduce in this definition that the design, the way that a person moves through software, even just the look of software, the feeling that it gives you, these things are actually important.

And they're important in, particularly our small business where we have absolute complete choice over the apps that we use, but also in our small business because of the potential for



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our workflow to be derailed by things we don't wanna do, because there's already so many things that we have to do that we're not necessarily the biggest fans of. And we do them or we don't do them because we have to, right? So I wanna introduce to you that for everything out there, there's always gonna be another technological way to do it, okay? So if something does not float your boat for your preferred user experience, drop it and find something else, find another way, Marie Kondo it, it should bring you joy.

So next definition here. An IT organization or information technology organization is the department within a company that is charged with establishing, monitoring, and maintaining information technology systems, there's my favorite word again, and services, okay? So establishing, monitoring, and maintaining, okay? I bet most of us are, like, maybe doing half of the last one, when we close all the tabs on our computer and reboot it, you know, approximately once every four months when it's so slow and glacial that we can no longer do work, right, but establishing and monitoring information technology systems.

Unless you're like a big app junkie, I know some people who just, like, try every single new thing and to find something new, and that's its own sort of occupation/hobby in and of itself, but unless that's you, I doubt that a lot of you out there are including time into your day to establish or monitor the tech systems that you use, okay? I am constantly monitoring the storage space available on my computer. Like, it's one of the things that I monitor, like, once a day, basically. I don't know that everybody else does that. I know that I certainly don't monitor other important stats on my computer. Like, if there are other parts that maybe need to replace, or, like, I don't know, if it's running fast enough, or things like this.

So there is a lot of parts of this that if you had a person who was dedicated to these things, they would be monitoring, okay, that we don't, and we deal with the things when they're broken, which obviously we all know is not the best. But we don't have the deep background to be doing this monitoring. And that's why I like this idea of systems because you can put into place, like, maybe when you do your annual review, okay, you just run a couple, like, check online, what should you check on your computer to see if it needs to be replaced or something. And then you look at those things. And you see, like, how problematic is your computer right now, okay? It's something that you can create a system for, you can create a template for yourself based on something you find online, and you don't need to recreate the wheel every time, and it doesn't need to be hard.

And in terms of establishing, this is also something I don't see. I see people maybe be in a conference talk and hear a software and app something mentioned, and say, "Oh, that sounds cool." And maybe they look at it or maybe they install it. But there's not this concept of establishing. We're gonna get into this a little more in a different slide, but what it means to really implement or onboard a software or an app for your business, okay? Last definition here and then we'll move on. Responsibilities may include overseeing the infrastructure of technical operations, managing a team of IT employees, obviously, that's not gonna apply to



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us, tracking technology in order to achieve business goals, eliminating security risks, increasing user satisfaction, and maintaining operations and systems.

Now, a couple of these here, maybe more than a couple, I'm gonna address on another slide. But I just wanna take a second to look at this idea of increasing user satisfaction. Probably not something that you think about in your freelance business as being something that you would necessarily do with technology. But let me tell you, I have seen some really janky things going on, both with freelance writers who work primarily for companies and freelance writers who work primarily for editorial in terms of the way that photos or files are sent, in terms of the way that information is passed back and forth between a client for whom you do work, like where you might be ghost writing posts for them or might have other types of, like, blog posts ideas that you need to transmit back and forth, okay?

Trello is not the best thing on the block. I wanna put that out there. I know some people like it. Trello was, like, post-it that's on the internet. It's, like, so analog. It's just people who are trying to replace not being in the office together. I wanna put that out there, Trello is not the best thing, okay? So I see a lot of people though who either they just say, "Oh, let's use Google Docs because it shareable," or their client uses Trello, so they say, "Oh, use Trello." And then they get into issues down the line where both users, yourself, the freelancer, and the client as well are not happy with various things in the way that the relationship is going that trace back to a software technology issue, okay?

I'm gonna say this again, I keep seeing with freelancers that there are issues with the satisfaction of their client because of the tools that are being used. And sometimes they're ones that you suggest, and sometimes the ones that the client suggests that you just accept, okay? So this can go in all sorts of things. It can be invoicing. I've seen people who invoice. I actually don't have a site specifically on invoicing software, but this is a huge thing. I have people who invoice their clients in some way where it's onerous and annoying for the client, and then the client delays doing the invoice because it's painful for them. I had somebody send me an invoice once for a conference that I was giving them thousands of dollars to sponsor that required me to setup a login and save my financial information on some super, super random janky-looking website that they use. And I wasn't comfortable with it. And I asked him how else I could pay, okay?

So there's a lot of different areas where we might not be thinking about technology as something that's worth splurging on where that means paying for a subscription, or taking the time to research where it can really, really improve your client relationships, okay? There's this tool called...well, we call it Client Portal actually, that's just what we call it. Let me see what it's actually called. But we use this tool which allows you to set up...yes, sorry, it is called Client Portal, which allows you to setup a really lovely dashboard for your clients. It just looks great. It's designed by someone who's both a web developer and an expert in user experience, user interface. And you can store all your files for the client there, how they get in touch with you, so you don't have to worry about them losing that email. It also has



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information, like you can show them what phase of the project you're in by like sort of making something active and something's not active.

So, like, let's say you are working with a client on blog posts, you can have the files for, like, all of the old months of blog post calendars up there and mark them as the active so they see which one you need their attention on right now, which one needs to be approved, and then it's just one place where they log in and use that. So this is the kind of thing I'm talking about, that technology can make our lives easier in ways that we might not necessarily be thinking about we're struggling with, that technology would be the answer. And like I said, there's a number of client-related situations where I can come up, but also, of course, in our own operations.

So I'm gonna look at how IT people segment out all of these different things they do. I also have on a later slide, hold on, like a big, long list of different things that they do that we'll circle back to in a minute. But I wanna just take a second and look at this more overarching stuff, or categories if you will, or divisions, because this helps you to understand maybe the ways that managing your own information technology, tech support software, whatever you wanna call it, or the things that you are doing in your business currently, whether you intend to or not, and how you might want to be more diligent and intentional about that.

Okay. So number one, number one key important thing here is how does your business and your IT align? So I was just talking to somebody else about this, about her resume. And we were talking about this idea of how the font she was using was killing me. I have a background in graphic design, so I know what the meaning of a font does. Like, if I look at something and I feel a certain way, I can look at the fonts and see what's wrong with it and know what kind of fonts to suggest. Most people don't, they will just look at whatever you have sent them, and they will feel a certain way. And they have no idea that it's not the words or something else about you. It's completely subconscious and psychological. And they will just feel that negative feeling, okay?

So this is the kinda thing where business-IT alignment, okay? Let's say you are using an invoicing software that is difficult, or onerous, or something like that, that is the impression then that you are creating for the client, okay? Well, let's say when you start an engagement with a client, you send them, you know, a contract that includes like a how-I-work document, and also maybe like a helpful template with monthly deadlines so that they know when you need different things from them in a glance. That gives an immediate impression that you are on top of things, that you are organized, that you not only will meet their expectations, but you have that expectations of them as well. And that this is more of a partnership like in a handshake kind of way of two businesses working together, okay? And this is something that you can do with an app called Dubsado. It spelled kinda weird.

Let me write the name of the previous app I talked about, Client Portal. This is the one for storing...I feel bad saying storing client files but storing client files and work information.





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And Dubsado is, I don't even know how to describe it. It does invoices, contracts, a lot of other client information as well. So if you use Dubsado, it's gonna align with your ethos that you are somebody who picks up all the pieces for your client and puts them together in a way that makes sense, that is simple, that has flow, that is organized, okay? So that is when business and IT align, okay? That's when the apps that you use, particularly on the client facing side, but even internally, are in alignment with your goals or your words for your business. If you've ever done the annual review series that we run, or perhaps the one from Chris Guillebeau upon which it's loosely-based, I believe he does it as well. But I have this whole thing of choosing three words for the year that I've used and I've kind of taught or coached around for, gosh, I don't know, I think at least five or six years now.

And a lot of times, people will have words that might be, you know, they might be momentum. I'm just trying to think back to a call that I had earlier today. So let's say it's, like, momentum, security, and diversification okay? Let's say those are three goals that people have. So if security is one of your goals and you're really thinking about it in the term of financial security, then it doesn't make sense if your sort of finances for how you interact with your clients or should go out or whack. You're gonna have a conflict with your goals there. And anytime you have a misalignment between your business and what you're doing, it's gonna start to create, like, all sorts of different ripple effects, I think maybe anxiety whether you realize it or not. So business and IT alignment are the really the top area here. There's so many benefits. We're gonna have another slide where we're gonna look at this as well.

Now IT governance. What this means is someone, in this case, obviously, it's you because you're the only person, is responsible for the unification where they wanna call it standardization, like, thinking as a unit, thinking in a high-level way, thinking in a forward-looking future looking way about what is going on with your information technology, your software, your tech support, okay? So we're gonna look at some different ways to be involved in that. But also, we have a whole webinar at the end on governance. And you'll see that also this idea of governance also has a lot of ethical implications as well. And so we'll look at how your data is being stored, how you are storing client data, and different things like that in another slide.

But I encourage you to also start to have, as we've mentioned in other parts of the series, sort of some guidelines for yourself. You know, like, I have a whole thing that, like, I won't do certain things with client information in terms of how it's stored. Like, I take a lot of really detailed notes on my coaching call for instance. And, you know, like, I have certain just guidelines that I put in place for myself for the security of that information. And I don't record coaching calls, or I won't take coaching calls near an Alexa that could potentially record them or something like that. So, like, those are some different governance things that I've kinda decided a top-down, policy-type way.



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Financial management. Now, obviously, this is the IT side of financial management. I've spoken a little bit about this in terms of invoices. But also, you know, there are so many different accounting softwares out there. It's interesting because I know we looked at this a little bit in the finance webinar. I think I had a whole slide devoted to this actually. And the thing is, like, I still don't think most people use them in terms of freelance writers. I think the majority of freelance writers still seem to be on a spreadsheet model. And honestly, I don't find that to be a huge problem, because the needs of our businesses don't fit super well in the travel lifestyle space with something like QuickBooks self-employed which doesn't offer you the ability to categorize things, and there's no way that we would need to.

But in terms of financial management, there's a lot of other things to think about. There's apps that you can use that will help you forecast your income for you so that you don't need to be either trying to do those calculations yourself or skipping doing them because you don't wanna do those calculations yourself. And then there's also this whole data security thing that we were talking about. I mean, I expect that if you are accepting money from clients in some sort of capacity where they are paying you online, you're going through some sort of third-party system that you might also be thinking about how these ties in with the governance, right? Like, let's say there's a system that was purchased by Facebook, for instance. Are you comfortable with having your financial data and your client's financial data attached to that, for instance? I know they're just coming out with a new currency, so I'm curious to see where that goes.

Now, IT Service Management. If you think about it, like in an office setting, it's like IT people who go around and fix your computer when it doesn't turn on and stuff like this. But IT Service Management for us as freelancers, I find to be actually even more important than an office setting. And I'm gonna get into that in another slide. Sourcing is this idea of what technology you're choosing to use and making sure that you choose the right one in the first place. And then configuration management is this idea of getting it setup, getting it setup in a way that has the most beneficial user experience for you. So we've got that IT alignment, the governance big picture, the financial management, the service management, sourcing and configuration management.

Now, I find those all the kind of mouthy words, if you ask me, they're kind of big. And so I found another way to look at it, which kind of makes it even more simplistic, which might fit you guys better. So this is just three sections, and it's governance, which like I said, is that like ethics, that kind of high-level stuff, infrastructure, which is having things setup to support operations of different areas of your business, and functionality, making sure it works. So you can see from the last slide kind of how those go together.

So sourcing and financial management go into infrastructure, business alignment, governance go into governance, and service management and configuration management go in functionality. So if you prefer, I kind of like these. And they make gif, which is, like, also a name for type of image. So I thought that kinda work. So governance, infrastructure,



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functionality. These are the three things about IT that you need to keep top of mind. So what does that really look like then? The very first thing you'll notice that they all mentioned, right, is this idea of this alignment between your business, your business goals, your business identity, and your technology.

So I'll take a little water break in the middle there and refresh my voice. But I just want to give you, like, 20 seconds or something to think about this topic of...you can either think about it like in an attractor way, you can think how is my current technology setup not aligning with my goals for my business. Here's a great example, people who think of themselves as being super location-dependent, like, they don't even have a home base, but they have a laptop upon which the battery doesn't work in such a way that they must work with a power outlet at all times. So that doesn't correlate with your location dependent goal, or mindset, or what-not, okay? So this is, like, a super basic one, okay?

Likewise, you know, to continue on the location of anything, but let's take a different way. Somebody who thinks of themselves as specializing in covering out of the way destinations, but they wanna be a well-learning writer, but they don't figure out ways for them to have internet and still do their work in those out of the way destinations. So this is like an IT hardware issue, okay, that there's things that you can buy now to have internet really, really quite everywhere, okay? So take about 20 seconds and think either in that detraction way, how are you not aligning with your goals, or if you have your sort of business goals, business identity very top of mind, think of a couple of things that can help you with technology to align with your goals better. And I'll give you a little bit of time. And then we'll move into some more food for thought, things and specific things you might wanna look into.

Okay, great. So I went ahead, and I took on the first slide where we looked at the definitions of all the different...or the three different definitions of what information technology departments did. I went through there also a couple other different pages, and I pulled out sort of the most important functions like tasks, more on the task level, than an IT department does. And I just wanted to look at these from the viewpoint of what we're doing in our writing businesses, because some of these are ones that, like I said, you might not have time for now, if there's thinking about, they might be something you can incorporate into some systems that you have for yourself, whether it's a weekly or monthly planning meeting, or your annual review, or something like that.

But there's some of these that you're probably already doing without realizing that you're doing. And since you're already doing them, I just want you to be a little bit more intentional about how that's happening, okay? So after this, we're going to look at some different specific names of apps. And then we're gonna look at the takeaways of some sort of things that you can do to get started right now. So budgeting, this is really big, actually. So like, I can tell you that I...I haven't looked recently, but I can tell you some of these things we pay for, like, once a year in six-months things, a couple we've changed recently, but I think that our spend on technology.



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So not any virtual assistants or, like, humans doing task, is probably somewhere in the 800 a month or something like that. But we, of course, as a website have to buy different licenses, a couple of different licenses for different websites as well. We don't use managed hosting at this moment, it's something that we're looking into. This is covering things like email, a lot of other different apps that you're gonna see me show you in a little bit. But I made that decision because I know how much it would cost me. And this is something that you guys don't always know in terms of your own time. But I know how much it would cost me to have a VA do these things, because I've tried over the years, have virtual assistants do different things, okay? Or like location dependent assistants, whatever you wanna call them. People do lots of different things for me.

And I know what it's gonna cost me in man-hours and I know what kinda results that I'm gonna get, versus if I use some sort of technological tool. So I know that I'm actually saving money for all of the different things that these things are doing me to pay that much. Now, you have to decide for yourself, and it depends what you have available. But you have to decide for yourself the line between this budget of time and money, because I promise you, there's a lot of tools out there that you could pay for, that would save you infinitely more money than they are worth just like in terms of the time that they save you, all right?

Now, a big thing here in terms of investments is tangible investments. I talk to a lot of people who have a computer that is keeping them from doing their work. Whenever I find myself, like, I've been doing this for several years, so I think I've gone through, this is maybe my third or fourth computer since being a freelance writer. I think that's not counting a desktop. This might be all laptops. So when I think about finding myself in a situation where I realized that I'm having trouble now doing my work because of some problem with my machine, I have to say to myself, "This is, like, literally my workspace.

This is the most important part of getting my job done. If this isn't working, if I'm spending, you know, five out of every six seconds waiting for something to load, or, like, worse than that, then I need to be reevaluating if I need to be setting aside the potential to invest in something better, and I need to look at what else I can do in the short-term to fix this problem in terms of a time investment for myself," okay?

Because I hear far too frequently from you, guys, that something is happening whether it's a phone, or a computer, also on the camera side. I mean, I'm not even delving into, like, too much about the sourcing and everything about cameras. But for us, you know, this is what I was saying about technology, it's not just information technology for us, cameras, video cameras, whether they are cell phone cameras, or a DSLRs, or whatever, this is also part of our technology kit, having portable internet devices, having portable chargers as part of our technology kit.

I mean, I basically don't go anywhere without my laptop, period, but I always, at all times, have a hopefully fully charged backup battery in my bag because I might just be somewhere



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out for a walk or something, and I might sit down, and I might write a great essay or write something that I need to write, and I need my phone not to die, okay? So this idea of investments in hardware, is not just things that are more computing devices, like, your phone, I mean, computer, okay? It's also the support items as well, backup hard drives, we're gonna get into that in a second.

So data storage and network planning. Now, I bet most of you who don't have blogs don't know too much about GDPR, I don't wanna get too much into it, but I do want to say if you also run a website in addition to doing other sorts of freelance writing, you need to be thinking about where your data is stored, because you might actually be violating GDPR just by having things on a server in a certain location. Likewise, your data, as in everything you ever write in your email, we'll get to that in another bit in this webinar, your data, you need to think about where it's being stored for yourself for redundancy purposes, okay?

Redundancy of technology is the number one thing that I wish more people would think about. I'm quite anal about this. I used to travel with, like, different hard drives, and different bags, and things on my computer, and all sorts of different stuff, because I'm was on the road and places with slow internet so much that I couldn't sink my computer and just back up everything on the cloud all the time.

Now, I have things on the cloud and multiple clouds, like in lots of different places. And if I, like, delete a file, or if I change something in a file, I have the ability to go back 30 days and see any earlier versions of that file, or if anyone else accidentally deleted some file, I still have hard drives for a lot of things. I keep all photos in like three or four different places. I keep them online, I keep them on two different drives, okay? So this idea of data storage and network planning, network being what servers your data is on is, like, a very crucial part of IT for us travel writers

Because data, I was talking about photos, right? Your research data, okay? All of the notes that you have taken on your trips, those are priceless, okay? They are priceless because they capture the ideas that you had at the time when they were fresh in your mind. They're priceless because they capture details, they capture names of businesses that maybe you don't have photos of and that are online and away for you to find. They capture quotes from your tour guide. That is incredibly priceless. And I see he will put these on notebooks, then who knows where the notebooks end up, and they can't find them. But one of the notebooks are gone, okay?

So I am also really stringent with all of my tour notes. I actually take them an email so that'll also be on my email server. And I send them to myself so that they're gonna be in both my received and my sent file, you know, in case of anything happening. And then I also have them stored locally on my computer, as well as on the server, as well as locally on my phones. And I keep all of my own phone so that even if I have the SIM card out, I can always



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go back through all the local files there. And they should also be on the server as well. Okay. So to me, like those notes and ideas are also a very critical part of our data storage plan.

Now, strategic planning capacity or capacity planning, this is like an interesting one. So, like, if you feel like you have big trip coming up, this is making those decisions to plan to have more hard drives or a better situation in terms of Dropbox or other online backup, or whatever that is strategically in advance in a way where you can build it into your budget, you can build out time to purchase it, you can build out times to buy the right things. And data security, we talked a little bit about this. And I mentioned this a little bit in terms of how I keep my client files. But I hope that you guys are being intentional with where you store your client data.

For instance, I never, ever, ever wanna store any client data on Google Drive. I don't feel comfortable with it. I don't feel comfortable that a free app that a company provides in order to be able to track our usage that I'm putting my client data there, for instance, okay? So, like, there's different things like this that are decisions for you to make for yourself. But data security, I have last pass on all of our different websites, like, I have all sorts of different layers like this for instance. Software, we talked a little bit about design before. Maintenance is an interesting one. I know a lot of websites are just automatically updating if you use a web app or something like that.

But if you have physical apps, you know, this is something that you have to think about a little bit. But you also have to think about maintenance in terms of how you change your workflows. Now, sourcing and implementation, we're gonna look at the apps that I use, for instance, about the sourcing topic.

But I just wanna take a second to talk about this idea of implementation that you need to also, when you get a new fancy software toy, or web app toy, or phone app toy, or whatever, in a traditional IT tech support setting, there's someone whose job it is not only to pick that thing out, but to read the whole manual, make sure they understand it so they can support people on it, make sure it's installed on everyone's machines, and make sure that people are trained properly on how to use it. I was able to take so many free classes on how to use different things like Adobe software products for, you know, InDesign, Photoshop, stuff like that, at MIT, because it was really important for them to train us in how to use these expensive and very useful tools.

Two other things here. Change management, we've talked about this a little bit. But what I mean about change management here isn't necessarily like in the long-term view of change in terms of the world, but more in this idea of change management in terms of when you need to make a shift in the technology that you're using, that's a big shift in your business. And in most companies, they actually bring in external consultants for this, to manage, like, a huge software shift.



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And it's something that they prepare for months, and that they have focused time for days. And that's the kind of thing that we need to be thinking about, that you're changing to a new laptop, or a new phone, or to a new way to track all of your pitches, or to a new file system, because now, you're gonna be backing everything up and you need to move all that around, or you need to reorganize your photo backups or something like that. This is something that you need to sort of set aside time and act like you're an external consultant.

Now, tech support. I'm gonna talk about this in a second, but with tech support, I want you to think more about not just being your own tech support but what is the redundancy? What is the backup that you have for yourself? What are your resources for this? Is it just Googling? Do you have something affordable for your budget? Do you have something that is supportive to help you with your tech needs, even if it's like a teenage cousin or, you know? I caution against using your own children because then you're gonna have to like trade them for something and the quality can be subpar. But see if you can get someone else's children, those worthwhile.

Now, a question to think about here is homework before we get into specifics sort of takeaways is where you spending your most valuable resource, which is time, in a way that you can and should deploy software for. I know we're just about at the end of our time, but let's pop over and take a quick look at some of the software systems that I use, and what I use them for, and why. Let me find this app for you. There we go. So this itself is an app. This is called Basecamp. I use this to store information that I need to share with other people, but in a very specific way. I use this internally, not for my clients.

So here's some different tools that we use. I'm just going to scroll through. So for instance for analytics, we use Barometrics because we do subscriptions. So it's not gonna make sense for most of you guys. We use Google Analytics. I think I don't say on here that I use Stripe for credit card transactions and SamCart for shopping carts. Google Analytics, obviously, everybody use this for their web data. We use ConvertKit for our email. We use Edgar foremost for social posts. We use Planoly for Instagram because you can see them in the grid format. Google Forms as well.

Email management, this is a huge one. So Contactually something which is a place where you can store a lot of different customer information. It's more like a CRM, if you're familiar with what that is. We use YouCanBook.me and schedule our coaching calls. We also use Zendesk, which is kind of, like, an online knowledge base for our internal sort of Dream Buffet and coaching program people. Oh, I do have this thing I'm purchasing. So Amazon, we use for a lot of things.

PayPal, I know a lot of folks use that as their primary invoicing software for their clients. I don't recommend it for a lot of reasons. We only use it as a payment mechanism for the database. We use a lot of different video tools. We use Amazon S3 is, like, yet another server backup space. We use Speechpad as the transcription service that we use. WebinarJam and



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EverWebinar are things that we use for our webinar broadcasts. But then we use Wistia because it looks better. I like it better for hosting our videos. They load really nicely. They look great. And WebinarJam is just a huge pain that way. And then we use Zapier to connect a lot of different apps.

So that, like I said, is not even all of the apps that I use for all of the things. And some of the ones that I use aren't gonna make sense for a lot of you guys. I know some people also do other types of, you know, online content creation. So hopefully for some of you guys, that might be useful. Some things to think about though now that will be huge...make a difference for you guys, is any sort of operations-related time fix that is simple, using the Google pre-written email template tools, I don't use Google email, so I don't know what it's called, or text expander. Setting up backups. Seriously, please, don't have all of your hard drives traveling with you if you're a nomad. Set in your schedule, like, one day a month where you go somewhere with really great internet, so you can upload everything, okay?

Other financial assets. Points, how secure are your airline points? This is an asset of yours, okay? Client data, research information, business cards. Are you having your business card scanned or photograph or something? So that if you don't have them anymore, somehow, you're able to get in contact with the marketing director of that huge company that you met. What is your redundancy plan for tangible and digital asset failures? I always travel, well, not always, but typically travel with a second cell phone.

If I'm gonna be gone for a certain amount of time in a period where I think it would be hard for me to get a new phone in a timely fashion either because of the location or because I'm busy, I pack a second cell phone. Same thing with laptops, I sometimes travel with a backup laptop. If I feel like my laptop is having issues, because I don't wanna get caught out. I've had times where I dropped my laptop. And I didn't have Dropbox setup yet. And I lost all my interview files for articles that I was working on. All this stuff, it happens, it can happen, it's happened to me, I don't wanna keep it from happening to you.

Quick note here. If you are only using a web-based email on a server that you don't own, like Google, Yahoo, anything like that, I talked about redundancies, right? Emails, client emails, you can get into he said, she said things with clients, even just about a particular blog post idea. I like to have all the emails in multiple places for this reason. Likewise, please don't forget, even if you are using Google, for instance, my customer service person, she has Google email, we cannot figure out why my husband works at Google and move it on spam. We cannot figure this out. Her email is going to my spam. I don't know why. We spent a ton of time. We use our own server and we spent a ton of time making sure that our emails are not on any of the blacklist for any spam lists anywhere, or this is something we spent a lot of time into as part of our sort of overall tech plan, okay?





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So that's what I've got for you today. A couple takeaways at the end with the bigger picture things, right? It's GIF, governance, infrastructure, functionality. Focus on that, and you will be good.

And I look forward to catching you on the next call. If you have any questions, you can reach us at [questions@dreamoftravelwriting.com](mailto:questions@dreamoftravelwriting.com). Thanks so much. Bye.