Workflow & Automation

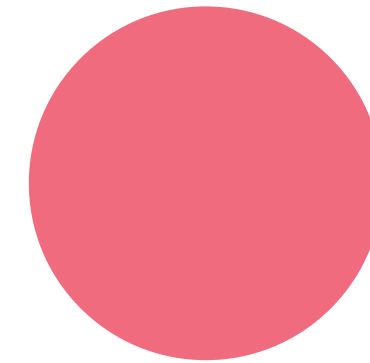Presented By: Hilary Colleen

BUT FIRST WORKFLOW

"The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency.
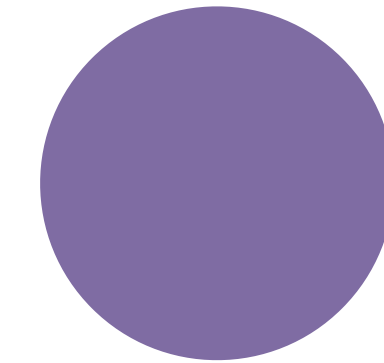
The second is that automation applied to an inefficient operation will magnify the inefficiency.
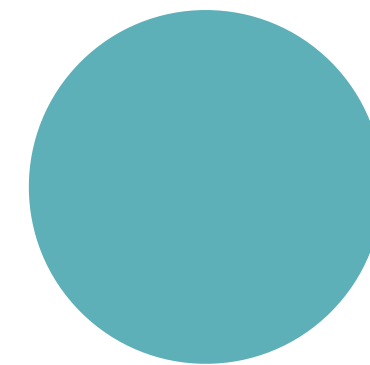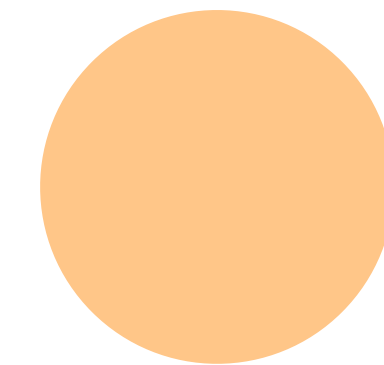
BILL GATES"

WHAT SHOULD A WORKFLOW INCLUDE

Client Communication

Project Due Dates

Daily/Regular Tasks

Backups, Storage & Security

SAMPLE HCP WORKFLOW

BOOKING

- Inquiry received
- Initial response email
- Quote/Contract/Invoice sent
- Quote accepted
- Contract signed
- Deposit received

PREPARING

- Welcome to the HCP family email
- Scheduling included engagement session
- Engagement session scheduled
- Shootproof gallery created

ENGAGEMENT

- Engagement session shot
- Engagement images imported
- Engagement sneak peek edited
- Engagement sneak peek posted
- Shootproof preview uploaded
- Images edited
- Images uploaded to shootproof
- Images exported for blog post
- Shootproof gallery released
- Engagement blog post written
- Engagement blog post published
- Save the Date selection email
- Guestbook or Parent Album decision email

PLANNING

- Initial Wedding Timeline Email
- Second shooter secured
- Wedding Day Questionnaire Email
- Questionnaire Received
- Questionnaire/schedule sent to second shooter
- Wedding week reminder email
- Shootproof gallery created

POST-PROCESSING

- Wedding shot
- Second shooter paid
- Images imported
- Images backed up
- Sneak peek edited
- Sneak peek posted
- Shootproof preview uploaded
- Sneak Peek Email/Included Thank You cards email
- Wedding Gallery & Album Process Timeline
- Images edited

DELIVERY/PUBLICATION

- Images uploaded to Shootproof
- Shootproof gallery released
- Vendors sent access to gallery
- Album Process & Cover Material selection email
- Images exported for blog, publication and album
- Images run through JPEGmini for blog
- Images uploaded to blog
- Images uploaded for publication
- Album design complete & prufr sent
- Awaiting Design Approval
- Final Design Approved
- Email for Parent Album Cover materials
- Cover materials received
- Album design(s) stomped
- Albums ordered

SEND-OFF/WRAP

- Thank you card sent
- Request review

BREAK IT DOWN

1

Structure

One workflow per project type
One workflow per phase type

2

Phase

Break your workflow down into smaller pieces (ex.: lead, onboarding, client, fulfillment)

3

Steps

Start writing out every step from start to finish from lead generation through delivery

4

Combine/Re-Order

Look at your list - what can be combined to be more efficient? What should be rearranged for better experience?

Engagement Session

ADD ▾ ▾

✉ **Send email: Scheduling Included Engagement Session**
When: Immediately after activating this workflow (approve) ▾

☑ **Engagement Session Scheduled**
When: 250 days before the base date ▾

☑ **Engagement Session Shot**
When: Immediately after all previous items are complete ▾

☑ **Images Imported**
When: 1 day after all previous items are complete ▾

☑ **Sneak Peeks Posted**
When: 1 day after all previous items are complete ▾

☑ **Images Edited**
When: 14 days after all previous items are complete ▾

☑ **Images Uploaded to Shootproof**
When: 1 day after all previous items are complete ▾

☑ **ShootProof Gallery Released**
When: 1 day after all previous items are complete ▾

✉ **Send email: Save the Date Selection**
When: 2 days after all previous items are complete (approve) ▾

✉ **Send email: Guestbook Album or Parent Albums**
When: 7 days after all previous items are complete (approve) ▾

Planning

ADD ▾ ▾

✉ **Send email: Initial Wedding Timeline Email**
When: 150 days before the base date (auto) ❓ ▾

▭ **Send questionnaire: Wedding Day Questionnaire**
When: 60 days before the base date (auto) ❓ ▾

☑ **Questionnaire Received**
When: 40 days before the base date ▾

✉ **Send email: Wedding Week Reminder**
When: 5 days before the base date (auto) ❓ ▾

WHAT CAN I AUTOMATE?

Any repetitive task

SAMPLE HCP WORKFLOW

BOOKING

- Inquiry received
- Initial response email
- Quote/Contract/Invoice sent
- Quote accepted
- Contract signed
- Deposit received

PREPARING

- Welcome to the HCP family email
- Scheduling included engagement session
- Engagement session scheduled
- Shootproof gallery created

ENGAGEMENT

- Engagement session shot
- Engagement images imported
- Engagement sneak peek edited
- Engagement sneak peek posted
- Shootproof preview uploaded
- Images edited
- Images uploaded to shootproof
- Images exported for blog post
- Shootproof gallery released
- Engagement blog post written
- Engagement blog post published
- Save the Date selection email
- Guestbook or Parent Album decision email

PLANNING

- Initial Wedding Timeline Email
- Second shooter secured
- Wedding Day Questionnaire Email
- Questionnaire Received
- Questionnaire/schedule sent to second shooter
- Wedding week reminder email
- Shootproof gallery created

POST-PROCESSING

- Wedding shot
- Second shooter paid
- Images imported
- Images backed up
- Sneak peek edited
- Sneak peek posted
- Shootproof preview uploaded
- Sneak Peek Email/Included Thank You cards email
- Wedding Gallery & Album Process Timeline
- Images edited

DELIVERY/PUBLICATION

- Images uploaded to Shootproof
- Shootproof gallery released
- Vendors sent access to gallery
- Album Process & Cover Material selection email
- Images exported for blog, publication and album
- Images run through JPEGmini for blog
- Images uploaded to blog
- Images uploaded for publication
- Album design complete & prufr sent
- Awaiting Design Approval
- Final Design Approved
- Email for Parent Album Cover materials
- Cover materials received
- Album design(s) stomped
- Albums ordered

SEND-OFF/WRAP

- Thank you card sent
- Request review

AUTOMATED HCP WORKFLOW

BOOKING

- Inquiry received
- **Initial response email**
- **Quote/Contract/Invoice sent**
- Quote accepted
- Contract signed
- Deposit received

PREPARING

- **Welcome to the HCP family email**
- **Scheduling included engagement session**
- Engagement session scheduled
- Shootproof gallery created

ENGAGEMENT

- Engagement session shot
- Engagement images imported
- Engagement sneak peek edited
- Engagement sneak peek posted
- Shootproof preview uploaded
- Images edited
- Images uploaded to shootproof
- Images exported for blog post
- Shootproof gallery released
- Engagement blog post written
- Engagement blog post published
- **Save the Date selection email**
- **Guestbook or Parent Album decision email**

PLANNING

- **Initial Wedding Timeline Email**
- Second shooter secured
- **Wedding Day Questionnaire Email**
- Questionnaire Received
- Questionnaire/schedule sent to second shooter
- **Wedding week reminder email**
- Shootproof gallery created

POST-PROCESSING

- Wedding shot
- Second shooter paid
- Images imported
- **Images backed up**
- Sneak peek edited
- Sneak peek posted
- Shootproof preview uploaded
- **Sneak Peek Email/Included Thank You cards email**
- **Wedding Gallery & Album Process Timeline**
- Images edited

DELIVERY/PUBLICATION

- Images uploaded to Shootproof
- Shootproof gallery released
- **Vendors sent access to gallery**
- **Album Process & Cover Material selection email**
- Images exported for blog, publication and album
- Images run through JPEGmini for blog
- Images uploaded to blog
- Images uploaded for publication
- Album design complete & prufr sent
- Awaiting Design Approval
- Final Design Approved
- **Email for Parent Album Cover materials**
- Cover materials received
- Album design(s) stomped
- Albums ordered

SEND-OFF/WRAP

- Thank you card sent
- **Request review**

AUTOMATED HCP WORKFLOW

BOOKING

- Inquiry received
- **Initial response email**
- **Quote/Contract/Invoice sent**
- Quote accepted
- Contract signed
- Deposit received

PREPARING

- **Welcome to the HCP family email**
- **Scheduling included engagement session**
- Engagement session scheduled

- Shootproof gallery created

ENGAGEMENT

- Engagement session shot
- Engagement images imported
- Engagement sneak peek edited
- Engagement sneak peek posted
- Shootproof preview uploaded
- Images edited
- Images uploaded to shootproof
- Images exported for blog post
- Shootproof gallery released
- Engagement blog post written
- Engagement blog post published
- **Save the Date selection email**
- **Guestbook or Parent Album decision email**

PLANNING

- **Initial Wedding Timeline Email**
- Second shooter secured
- **Wedding Day Questionnaire Email**
- Questionnaire Received
- Questionnaire/schedule sent to second shooter
- **Wedding week reminder email**
- Shootproof gallery created

POST-PROCESSING

- Wedding shot
- Second shooter paid
- Images imported
- **Images backed up**
- Sneak peek edited
- Sneak peek posted
- Shootproof preview uploaded
- **Sneak Peek Email/Included Thank You cards email**
- **Wedding Gallery & Album Process Timeline**
- Images edited

DELIVERY/PUBLICATION

- Images uploaded to Shootproof
- Shootproof gallery released
- **Vendors sent access to gallery**
- **Album Process & Cover Material selection email**
- Images exported for blog, publication and album
- Images run through JPEGmini for blog
- Images uploaded to blog
- Images uploaded for publication
- Album design complete & prufr sent
- Awaiting Design Approval
- Final Design Approved
- **Email for Parent Album Cover materials**
- Cover materials received
- Album design(s) stomped
- Albums ordered

SEND-OFF/WRAP

- Thank you card sent
- **Request review**

SAMPLE HCP WORKFLOW

BOOKING

- Inquiry received
- Initial response email
- Quote/Contract/Invoice sent
- Quote accepted
- Contract signed
- Deposit received

PREPARING

- Welcome to the HCP family email
- Scheduling included engagement session
- Engagement session scheduled
- Shootproof gallery created

ENGAGEMENT

- Engagement session shot
- Engagement images imported
- Engagement sneak peek edited
- Engagement sneak peek posted
- Shootproof preview uploaded
- Images edited
- Images uploaded to shootproof
- Images exported for blog post
- Shootproof gallery released
- Engagement blog post written
- Engagement blog post published
- Save the Date selection email
- Guestbook or Parent Album decision email

PLANNING

- Initial Wedding Timeline Email
- Second shooter secured
- Wedding Day Questionnaire Email
- Questionnaire Received
- Questionnaire/schedule sent to second shooter
- Wedding week reminder email
- Shootproof gallery created

POST-PROCESSING

- Wedding shot
- Second shooter paid
- Images imported
- Images backed up
- Sneak peek edited
- Sneak peek posted
- Shootproof preview uploaded
- Sneak Peek Email/Included Thank You cards email
- Wedding Gallery & Album Process Timeline
- Images edited

DELIVERY/PUBLICATION

- Images uploaded to Shootproof
- Shootproof gallery released
- Vendors sent access to gallery
- Album Process & Cover Material selection email
- Images exported for blog, publication and album
- Images run through JPEGmini for blog
- Images uploaded to blog
- Images uploaded for publication
- Album design complete & prufr sent
- Awaiting Design Approval
- Final Design Approved
- Email for Parent Album Cover materials
- Cover materials received
- Album design(s) stomped
- Albums ordered

SEND-OFF/WRAP

- Thank you card sent
- Request review

TOP FAVE TOOLS FOR WORKFLOW & AUTOMATION

17hats

Client Management System
Handles lead forms, quotes, contracts, invoices, payments, questionnaires, calendar management, email automation, workflow, reminders, bookkeeping & more

Quickbooks Self-Employed

Accounting & Mileage Tracking
Automatically tracks mileage and expenses with easy classification for tax purposes; mobile app recommended

Catch.co

Tax withholding & benefits for small businesses
Takes taxes out of income based on expenses and state/federal requirements to put in separate account for quarterly tax payments. Also offers retirement, vacation, health insurance, etc.

Backblaze

Automatic Secure Cloud Backup
Automatically backs up entire computer and plugged in drives to secure cloud location; backups are deleted after 30 days

TOP FAVE TOOLS FOR WORKFLOW & AUTOMATION

hilarycolleen.com/17hats

50% off 17hats

hilarycolleen.com/catch

FREE tax withholding & benefits for small businesses

hilarycolleen.com/quickbooks

50% off Quickbooks Self-Employed

hilarycolleen.com/backblaze

$6/month unlimited backups