

Prof Advisors - Operations, project management, and business strategy for 7-figure businesses with
Emily Allen (S3E44)

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00:06 Speaker 1: Welcome to the Legal Road Map podcast for online and e-commerce entrepreneurs. I'm your host, lawyer Autumn Witt Boyd. I'm an experienced copyright and trademark lawyer. With my team at the AWB Firm, I leverage, grow, and protect multimillion dollar online businesses. My goal in every episode is to teach you about the sophisticated legal and business strategies to build your own seven or eight-figure business. If you're a new business owner, go back and listen to Episodes one through 12, you'll learn the basics to set up a strong legal foundation. The Legal Road Map podcast is sponsored by the AWB Firm. You can find show notes for every episode and learn more about how we help our clients achieve their next level goals at awbfirm.com.

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00:52 S1: Hi, everybody. Lawyer Autumn Witt Boyd here, and I have a special treat for you guys today. I have my friend, Emily Allen, who is an incredible business strategist, and she is going to be the last installment in our series that we've been doing during the month of June on working with professionals in your business, especially as you are growing to your seven and eight-figure goals. We've been talking all month about what professional advisors you need to bring on to your team, when it makes sense to bring them on your team, and who you might need to work with. I would love for Emily to say hello and tell you a little bit about herself and her business.

01:26 Speaker 2: Hello, and thank you for having me, Autumn. Yes, Emily Allen, and I am a virtual COO, so Chief Operations Officer. Really working with the CEO, the business owner that doesn't necessarily wanna have an operations person part of their team full-time. My background, I am a certified project management professional. I've spent a number of years in the corporate space, so worked with a lot of medium and large-sized businesses really, working on managing projects, streamlining processes, and optimizing operations pieces. So I naturally love all things planning and organizing, and I naturally gravitate towards that structure and that discipline. I really just wanna help people stay accountable for the work that they wanna achieve.

02:17 S1: That's awesome. And full disclosure, Emily and I are working together right now. She is helping me streamline and work on some of my processes, helping me with my team, and the AWB Firm, so it has been really great getting to see inside her brain a little bit, and helping us work on our business. And if you are watching this on Facebook Live, feel free to drop any questions that you have in the comments, and if you're listening to this on the podcast, no comments available, but I'm happy to hear what you have to say. If you wanna pop over to our Facebook group, that is the Legal Road Map Facebook group.

02:46 S1: So Emily, I would love to hear exactly how do you work with clients. Do you have a process that you take them through? Or, do you do different things depending on what the client needs? Just tell us a little bit about your services.

02:57 S2: Yeah. Every business is different so it's a little bit custom, it's not a cookie cutter type package here that I offer. But it really is about... I usually spend about three months up front with somebody really understanding where are you at in your organization today, where do you wanna go, what is that vision for five years from now, what's that vision a year from now, and understanding how are we gonna get there. So really putting those plans in place to get that work done with the resources we have, and really pulling you through that way. So that's really high level how I work with people.

03:35 S1: Yeah, and can you delve into some more of the details about some of the specific work that you do? Like, let's say if I had a project in my business that I had no idea how to get started on, how might you help me figure that out in my business?

03:47 S2: Right. I think that happens a lot. A lot of people have so many big ideas and things that they wanna get done but really figuring out that plan, "How do I," like you said, "get it started?" As a project manager, that's where I come in and really meeting with you to understand what is the end goal, what does that look like, and just kind of you have it in your head, it's really me pulling it out. So we sit together and really understand what needs to be first, second, third. And who's gonna do the work and in what order, what dependencies are there on other work that you might have, what other projects do you have going on to understand, is it really realistic to get this work done, and really does it align with the vision that you have at this period of time?

04:29 S1: So you help people focus on what's really important, what's really gonna move their business towards their goals rather than grabbing at all the shiny objects, which I think we are all pretty guilty of.

04:39 S2: Yes, I do start there. It's great that you have all these ideas and things that you wanna get done, but before we jump into what's on your backlog, what do you wanna accomplish for the year, let's just take a step back and say, "What is your vision really for this year at this point in time? Things change in your business so we have to readjust and relook at that vision throughout the year." So again, that's something I do too, quarterly planning, reviewing this vision, and understanding. So yes, first is, does it align with where you wanna go in your business? And then let's start to outline and how does it fit in with everything else that you have going on? [chuckle]

05:13 S1: Yeah, and for a business like mine that is really direct client services, it's been really helpful the way we've been talking about capacity. So, do we have the right people in the right roles, and if we're gonna do all these projects, who's going to do them in addition to all the things we're doing right now? Because our main goal is always to provide really excellent client service, and so we don't wanna let that slide. But I think all of us have probably a lot of important but not urgent projects on our list, whether it's marketing or other projects, new services or products you want to put together that take time away from your day to day, what you're doing now. And so that's

been really helpful with you helping us just really see that and prioritize.

05:55 S2: Right, and that is key. Yup, like I said, just taking it all and organizing it, and figuring out what to work on first, second, and third.

06:02 S1: Yeah. So tell me, is there a certain point in a business owner's journey where it makes sense to bring someone in like you? I was thinking about that this morning and I just finished year three of my business. And of course, all businesses are different, but a lot of the work we were doing, I'm not sure I would have been ready to do even last year. So I feel like you probably have a good idea or some suggestions on that.

06:25 S2: Right. You wanna be having a good revenue stream coming in so that you can afford to have somebody on your team or to consult with like this. You're ready to scale, you've been doing these things and you've been managing along with you and your team, that you're ready to take it to that next level, whatever that might look like for you, and you know that you can't go at it alone. You're managing all the things, you're wearing several hats, you're trying to maybe get yourself out of all the day to day work or all the meetings, and it's time to really assess. I've been doing things, bootstrapping it for awhile, it's ready to put some more structure and formal processes around the work that we do so that again, you can pull yourself out a little bit, let other people do some of the work to help you because that's gonna get you further in the long run.

07:12 S1: And are there revenue numbers that people typically come visit you? Or a point in their business? Or is it kind of all over the map, just when people are pulling their hair out and realize they need help?

07:22 S2: Well, I think they can happen early on. [chuckle] So definitely not for somebody that is starting their business, but like I said, you're in that year two to three, multi six figure, and you're looking to go to seven figure, seven to eight.

07:35 S1: Maybe seven or eight?

07:35 S2: Mm-hmm. Right. Really wanting to have that support, somebody that is gonna partner with you, that's gonna strategize with you and support you, help you stay accountable as well for the things that you have.

07:46 S1: I know. I sometimes think about that, I need a boss. [chuckle] I just want someone to tell me what to do.

07:51 S2: Yup, and it helps. I'm further removed from the work so it's easier to help keep people going.

07:57 S1: Yeah, and I think it's probably really helpful if you've been in business long enough that you know what's working, you know what you wanna double down on, or where you want to scale, you're not just still trying all the different things, you've maybe figured some things out.

08:10 S2: And that's a really good point. You do have to understand the work that you're doing to do that, but even to be able to delegate. One of the things I work on too is roles and responsibilities. What is the work that this role should be doing or can they do? So that as we lay out the plan of, "Here's all the work that we're gonna do both internally to your business and with your clients," we understand who can do this work, who's got the capacity to do it as well.

08:35 S1: Yeah. So I would love to hear you tell either some stories or just a high level overview of some of the benefits that your clients have seen from working with someone like you.

08:44 S2: Yeah, I think there's a lot more sense of more organized. They know exactly where they need to go. One of the things, a lot of entrepreneurs aren't doing this right now. So taking the time to plan and really help you see what's around the corner. Right now you may be thinking, "I really don't know what I'm gonna work on next. I'm working on this one thing, but what's next?" Working together really helps people see what's around the corner and what's the next hire to make. Or, again, just feeling more organized knowing what people are working on and when. And more time to work on your zone of genius or the things that you need to do as the owner of the business. You don't need to be worried about scheduling meetings, or setting up some of these systems, and worrying about the processes. 'Cause that's why you have a team in place, so you've got bigger things to do. So really, again, just feeling less anxiety about, "Oh my goodness, I didn't get to all these things on my to-do list and now it's carrying over day to day, week to week, month to month." And again, not having...

[overlapping conversation]

09:42 S1: I'm not the only one who does that, I just copy the to-do list on to the next day. [chuckle]

09:46 S2: No, you're not the only one. And just being more comfortable delegating. So I think those are the top things. Really giving some of that time back, really being able to delegate and feel comfortable that now that there is structure in place, I can delegate, and I feel more comfortable making decisions that are sound decisions. It's not like, "Oh, I feel like this." It's truly, this is the data that's there to support that decision.

10:09 S1: Yeah, and just having someone who really is experienced in this area has been huge for me. I've said before, I didn't go to business school, I was a journalism major undergrad and then went to law school, and so I'm learning a lot of these business strategies as I go, which I think a lot of entrepreneurs are the same way. You maybe had a special skill or something you really enjoyed doing, and so you've managed to grow the business to a certain point, but then there is a certain point where having another set of eyeballs that is really experienced in planning, and projects, and process is super helpful.

10:40 S2: Yes, definitely, definitely. Being able to move you along, and again, just continue to grow, you're successful, you're doing great things, but let's again scale it and make it bigger and even better.

10:50 S1: Yeah, and one of the benefits I've seen also already from our work together, just setting out, "Okay, here are all the things I wanna get done, let's put it in quarters and then let's see do we actually have the people to do these things?" 'Cause I think I felt a lot of guilt like, "Oh, I'm not doing enough, but I'm working a lot, so how am I still having all these things on my to-do list?" And then seeing that in black and white, all the things I was trying to get done on top of a full client workload. It's crazy town. So you have to figure out what really matters. [chuckle]

11:18 S2: Right. It becomes real, real quick when you lay it out that way. And I think that's one of my favorite things to do, is to take everything that the CEO is doing, putting it on paper and look at what you've accomplished, you're doing great things, and then laying out what we're gonna do going forward.

11:33 S1: Yeah. And figuring out where it might make sense to make more investments in the business or where maybe you need to pull back or move some things around, I think is really important too.

11:40 S2: Right. Yep, having that plan, you can see clearly, like you said, what's around the corner, who's that hire? What system are you ready for now because you've lived through the do-it-yourself, and you understand what are those requirements of that next system, that next hire that you're gonna make?

11:56 S1: Yeah.

11:57 S2: You have a better understanding of what you need. I think sometimes one of the things I see as you jump in, you've got all these systems and it's like, "Well wait, we could probably have scaled back a little bit on that before." So we really understand what is it that we need. So I think my thing is really, cross this before the tool, really understanding what needs to happen and what's gonna work for your business.

12:18 S1: That makes a lot of sense. And you've pointed out some KPIs, some key performance indicators, for me to keep an eye on and asked me to gather some data. And when you first asked me I was like, "Oh, that's gonna be a lot of work." And then I realized, just delving into the systems we already have, we use a SONA for project management, my assistant who loves playing around with things like this managed to do some reporting that we already had a tool to do. I was like, "Oh, we're gonna need a new tool for this." And it turned out our existing tools actually could provide the data we needed, so that was super helpful and it was something we had never looked at, but I think is gonna be really important for us moving forward as we're looking at project status and who's working on what.

12:55 S2: And I think it applies to anything that you're doing, really address that current state, draw that picture, draw that flow, what is the work that you're doing, and then say, "Well, here's where I wanna go," and then bridging the gap with either something you have, or purchasing something new, or creating something new.

13:10 S1: Yeah, absolutely. So I would love to hear from you also. Now, I try to stay positive, I'm an optimist by nature so I don't like to tell horror stories and use fear tactics, but I do think it's important for people to hear some of the things that can go wrong if you don't have a grip on your operations, especially if you're scaling rapidly. So I would love for you to maybe tell some worst case scenarios or some things that you have seen gone wrong that maybe could have been addressed better.

13:35 S2: Well, I really think you're just distracted from this bigger picture. So again, you're wearing all these hats and you can't even focus on that vision. I don't even know if you understand what your vision is. So again, you're working on all these things, fighting fires and other things are just demanding your attention. So, like I said, and then you're spread too thin, you're struggling to make time for yourself and for your team. But I think other than that, one of the biggest things is that you're not delegating, holding on to all these things, and not feeling comfortable.

14:09 S1: Too many things.

14:10 S2: Right. So, I think that's the biggest thing because, again, it just hinders you from moving anything forward. There's a couple other things, again, making sure you're getting out of your own way, that you're hiring the right people to support you, I think that comes back to the roles and responsibilities work that I do, understanding what is it that you need at this point in your business or even a little bit down the road, and putting the right systems in place at the right time, and then using those tools to make the right decisions. But again, I think it's really that delegation piece, not doing that well is really the number one thing that's holding you back from moving forward or something new.

14:44 S1: And do you see people who are maybe dropping balls or things are slipping through the cracks because they're not tracking them well? Is that something you come in and help with?

14:53 S2: Definitely. Again, you're making decisions on, "Well, I feel like this isn't going well," but in all reality you are, you're doing well, you're hitting your goals every month, but if you don't have something to track it to really see it in front of you, it makes it that much harder to track and make those good decisions on.

15:12 S1: Yeah, so it sounds like working with the COO, it's a very personal relationship, it's not something you can just do through a course. There might be pieces of this that you could learn on your own, but making an investment and working with someone like you, you definitely wanna be at a point in your business where you're ready to do that. So how would you suggest if you are seeing all the bells are ringing and you're saying, "Yes, I need someone like this to help me," how would you recommend that people look for a business strategist or a COO who would be a good fit for their business?

15:40 S2: That's definitely...

15:41 S1: Not everyone can work with Emily. [chuckle]

15:43 S2: Right. Although I'd love to. No, I think really it's networking, understanding who maybe has worked with somebody in the past and having that conversation with them, not just maybe the first strategy call, but jumping and seeing, "Do they have a recommendation on something? How do you guys jive together?" Or doing a one-time project just to see how you work together before jumping into this bigger commitment and feeling like, "Oh my goodness, I can't say no, but yeah." And I would say just referrals as well. Again, talking to other people who have worked with somebody like this. I know I can make some referrals as well, but... [chuckle]

16:20 S1: That's a nice thing. I feel like some of my best referrals come from other attorneys, and I'm able to send people to other attorneys too, because we know what will be a good fit. So, probably the same thing for you.

16:29 S2: Right. Yes, different work and different people align differently.

16:33 S1: Are you industry-specific, Emily? Or do you find that for this kind of role in your business, it helps to have someone who is experienced in your type of business, whether it's products or services or a different kind of area?

16:43 S2: No, I'm not specific right now. It's really applying the same concept, really applies to every type of business. I've mostly been working with service-oriented business owners at this time, but again it applies to anybody. Like I said, "Looking at where you are today, where do you wanna go and what steps do we have to take to get there?"

17:04 S1: And are there things that you've seen, especially like in the jump from six to seven figures, where you've got some special insight or is that a critical point where people should be thinking about this type of thing?

17:16 S2: I definitely think at that point, not only are you gonna need that structure with your systems and processes, but you're also building your team. And so having me come in and help consult with before you hire that team is really gonna give you an advantage to who do I need to hire and what do they need to do for me. I don't need to stay with you necessarily long term, although that is something that I do do. It just, again, gives you that insight into, "Where do I need to go? What do I need to support me from that team perspective as well?", because again, we know that you can't do it all, nor do I think that the CEO wants to do it all.

17:52 S1: I don't wanna do it all. [laughter] I'll tell you that.

17:56 S2: Definitely.

17:56 S1: So do you help with things like writing a job description, or helping point people in the right way as they're building their team as well?

18:01 S2: Definitely. A lot of things can fall under operations. HR-related type things, managing that interaction maybe with an attorney. There's a lot of communication that goes back and forth between different providers. Operations process design the project management, I think I said HR already. So really yeah, helping with that. And as we identify those roles and responsibilities in creating an org chart, you're gonna have that information, so that's gonna help build that job description. And definitely helping giving that posted out there and helping interview people if necessary, and managing that process as well.

18:38 S1: 'Cause I think that can be something that's really overwhelming. You can hire as many people as are out there, because we all have lots of different things that we need done in our business. So figuring out the right fit, the right type of skill set for where you are right now, and also where you're going. So is that something you look at also, not just what you need today, but maybe what you might need in a year or two or three years?

18:58 S2: Exactly. Just like the work that we're doing, it's really looking at starting high. "What are you doing? Where do you potentially see yourself in 10 years? Well then, let's pull that back. So five years, that's a little bit more tangible, three years and then one year, let's look one year from now." And then we break it down by quarter. So, what really needs to happen in each of these 90-day increments and then revisiting that every quarter to understand, "Has anything changed? What have we learned?", and adjusting from there. So that's really key as you continue on your journey and growing your revenue and your team. Whether I'm part of that or not, that's definitely something I wanna see people continue to do.

19:36 S1: Yeah, and I think the accountability piece is huge too with the COO, 'cause I am definitely guilty of making grand plans, I am a planner, and then not looking at them [chuckle] and they go in a drawer. And at the end of every year I go back and look at my plans from January, and sometimes I have found, "Oh, I did all these things and I had forgotten that they were even on my plan." They managed to happen, but some things totally got by the way side. So having someone who's making sure that you're keeping your eye on that prize, I think, can be huge. When you've got... As the COO, you've got a thousand balls in the air and everybody is pulling your attention in different directions, so to have a steady guide is really helpful.

20:15 S2: Right. And the COO is real bright to help her bring that in and manage a lot of that, even managing the team, the work that they're doing and all those projects, and really making it visible to you as the CEO, "Here is your task list and here's where you find it, and this is what we're... And we're gonna have accountability meetings or touch bases once a week or every other week to help you manage through that as well." So that's definitely something that this role does as well.

20:39 S1: Yeah, and can you talk about how you help figuring out time management and calendaring? I know that is a sore point for a lot of people, especially if you have bootstrapped yourself to maybe the mid six-figure level and you're trying to grow to that seven or eight-figure level. How do you help with that area?

20:57 S2: Just like we do the planning of the projects and things, I like to lay it all out. "What do

you have? From the business perspective, are there highs and lows in your season, if you will?" And then understanding from a company perspective, "Are you required from a compliance perspective to do things at a certain point throughout the year?" And just really laying out what's weekly, monthly, quarterly, yearly, etcetera, and then overlaying that with what client work do you have and just understanding, again, that work that you have. "I really love the time blocking of your calendar so let's schedule some project time where you can dig in and work on some of those things that are on your to-do list." Understand when is your most productive time? Is it the morning? You have to block that and do the most difficult tasks in the morning. Save the emails for the afternoon, I think email...

21:43 S1: [chuckle] Yes.

21:44 S2: Big time suck so I try to pick two times, one in the morning, one in the afternoon, to do some responding that way, but really blocking that time to focus on sales, or focus on followup. I often hear, "It's great, I can block it, but I don't always honor that."

22:00 S1: [chuckle] Guilty.

22:01 S1: And I think in working together with the COO, again, somebody who's helping you stay accountable, and you understand that when it says sales or marketing or finance, you know what is involved, you now have a plan to reference to say, "Alright, I know when I sit down this is what I'm gonna work on today," 'cause you've got that plan in place.

22:20 S1: Yeah, it makes it so much less overwhelming if you have...

22:23 S2: Break it down into more manageable pieces, and that's why we spend that half a day or day strategizing and understanding where it is you wanna go and what this is gonna look like over the next 90 days, 'cause if we look at it from the year perspective, we are gonna get very overwhelmed, and that's what I'm trying to avoid. Let's lessen that overwhelm, let's decrease that anxiety so that you can be the best that you wanna be and bring everything to your business that you're great at.

22:48 S1: Yeah, and I think it is really easy. I know email is my go-to when I look at my to-do list, and I'm overwhelmed and I'm like, "I can't even... I'm just gonna go do email for a few minutes 'cause I need to check it anyway," and then you lose half your day doing that. So really having a plan in place.

23:02 S2: Right. And it goes back to it too, looking at that list and saying, "Is it urgent? Is it important? Is it urgent and important? Can I delegate that? Or is that really a project and we need to have a plan? And then if there's a plan, who can do that? And is it realistic to do it this quarter, this month?" And really honing in on that. So that is just super helpful, I think that's been one of the most beneficial things with my clients, because, again, you know where you're going and what steps to follow. And again, starts to get you out of all of the work, delegating to those on your team to move things along.

23:35 S1: I love it, it all comes back to the plan.

23:38 S2: It does. I know, I say that all the time, but I just love it.

23:41 S1: Okay.

23:42 S2: Planning a process, it is the root of it all.

23:45 S1: Yeah, that's awesome. Well, Emily, I know this has been super helpful for me, and I know that our listeners and our watchers on Facebook Live have gotten a lot out of this plan, plan, plan. So tell us where we can learn more about you, or if people might be interested in working with you, how they could get in touch.

24:00 S2: Yeah, definitely. On my website, just emilyallen.co and go there and send me a message using the contact form there. You can check out some of the packages that I offer, but definitely just schedule a call. I think that's probably the easiest so that we can talk about your business. Again, I wanna understand where you're going, what you wanna accomplish, and what kind of working together would look like for you. So, again, not everything is cookie cutter and can be customized to you.

24:30 S1: Yeah, I love it. And we will put that link in the show notes and in the comments here on Facebook Live. So, everybody go check out Emily, and thank you, Emily, for all of your thoughts and planning advice, this has been great.

24:42 S2: Wonderful. Thank you for having me.

[music]

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