

STREAMLINED BY MARTINE

5 key steps to take BEFORE setting up your Dubsado

TO AVOID OVERWHELM & MAXIMIZE YOUR SUCCESS



DUBSADO PROCESS MAPPING

STREAMLINEDBYMARTINE.COM

Hi, I'm Martine



I AM A SYSTEM STRATEGIST & CERTIFIED DUBSADO SPECIALIST.

I know running a creative business is not easy and you have a million things to think about. I am here to help you streamline your business processes so you can spend more time doing what you love and working on your clients' projects, rather than spending time sending emails (such as scheduling appointments, confirmation emails, appointment reminders, follow-up emails for leads that didn't book, etc.).

If you are ready to cut the repetitive tasks and start doing tasks that actually make you money, then let's get started.

STREAMLINED BY *Martine*



Are you struggling with where to start with Dubsado?



FEEL FAMILIAR?

You've just signed up for Dubsado and once you've logged in, you just felt completely overwhelmed by all the different menu options, the dashboard, the projects, the templates... it was just a lot to take in.

You've invested in Dubsado because you heard so many other creative business owners like you talk about how great and useful it is for their business... but you just feel confused and don't know where to start.

I **get it!** Dubsado is intimidating and confusing. I can definitely relate to the feeling of "I know I SHOULD do this... but I don't know where to get started!" Dubsado is great once it's running, but it takes skill and time to set up and customize!

This is why I created this freebie, to guide you through the 5 key steps you should take BEFORE setting up your Dubsado. This will help you feel less overwhelmed and maximize your chances of success.

The first thing you need to know about is **PROCESS MAPPING**

AND WHAT IT CAN DO FOR YOUR CREATIVE BUSINESS



Process mapping is all about:

- Identifying a workflow strategy for each of your services
- Determining each step your clients will go through when working with you
- Creating ALL the content (emails, forms, schedulers, etc.) you will need to build your workflows

BUILDING WORKFLOWS IS EASY WHEN YOU HAVE A PLAN - This is what we do during process mapping, we create a plan that speaks the Dubsado language. Your Dubsado setup needs to be tailored to your business, in order for you to gain all the benefits of an automated system.

BENEFITS

1. **Having a properly set up CRM** to make your life much easier as a creative business owner. Not pulling your hair out trying to figure out Dubsado
2. **Having a clear plan that's easy to implement.** Feeling relieved knowing exactly what you have to create and how to implement it inside Dubsado. No more guesswork, to make your Dubsado run smoothly.
3. **Building workflows the right way**, the first time around... You will feel confident that your Dubsado will be working like a well-oiled machine at the end of your build.
4. **Being more efficient & profitable.** You will be spending more time focusing on actual money making work – your client project. THE reason why you started your business in the first place.

5 KEY STEPS CHECKLIST

Before you start setting up your Dubsado account, it's important to know what you will be building, what you need to create and how everything will fit together. I have prepared a checklist with the 5 most important steps you need to take. I do this with all my clients before their VIP Experience and it's has been a game changer!

CHECKLIST:

DEFINE SPECIFIC PACKAGES FOR EACH OF YOUR SERVICES

Clearly define what type of packages you will offer and what services they included. For example, my VIP Day is a Done-For-You Dubsado setup for your Signature Service. Packages are easier for your client to envision what they will walk away with - in my example, your Signature Service fully automated inside Dubsado - and they are also easier to automate for you on the back end.

GET CLEAR ON WHAT YOU WANT YOUR PROCESS TO LOOK LIKE

This is closely tied to your packages. What is the prep-work going to look like? Are you offering 1 or 2 revisions? How often do you want to follow-up if they don't provide the necessary feedback? It's important for you to determine what type of clients experience you want to offer.

MAKE A GROCERY LIST OF WHAT HAPPENS NEXT IN YOUR PROCESS

This is as easy as asking yourself: "What happens next". To be crystal clear about how far you can push this exercise, let me give you an example: You send an intake questionnaire. What happens next? The client fills out the intake questionnaire. What happens if they don't? What happens if they do? Rinse and repeat this step for every interaction you have with your client.

LIST OF ALL THE DOCUMENTS YOU NEED TO SEND YOUR CLIENTS

For each of your services, take the time to draft a list of all the documents you send to your client. This includes the inquiry form, the proposal, the contract, the intake questionnaire, any prep-work, refinement questionnaires, and much more. This will help ensure you don't forget anything along the way.

MAKE SURE YOU TEST YOUR PROCESS ON 2-3 CLIENTS

This is key to see what's working or not, get customer feedback and also see how you like the process before spending hours creating your content, writing your canned emails and building your workflows.



THANK YOU!

**DID YOU LEARN SOMETHING NEW?
DO YOU HAVE ANY QUESTIONS?**

LET'S STAY CONNECTED!

@STREAMLINEDBYMARTINE
HELLO@STREAMLINEDBYMARTINE.CO