



SPI 360

How to Plan and Manage Projects and Programs Successfully – with Janna Maron from Team SPI

February 27, 2019

Pat Flynn: As a business owner or entrepreneur of any kind, anybody who is creating content on a regular basis, and then adding on top of that special projects such as creating courses or launches or coaching program, services, anything you might have to offer—one really important aspect of running the show or your business or your content is the planning and management of those things. That stems from just the ideation of how to do those things to the ongoing systems and requirements to continue to do those things very well and uphold the, hopefully, level of standard that you and your audience can enjoy.

So today on the podcast I'm very, very thankful to bring on one of my team members with me to discuss how to plan and manage projects and programs. So coming up we have Janna Maron who is my Editorial Director, and she's in charge of the planning and execution and project management of projects, but also programs. What are each of those things? We'll define those a little bit more as soon as we start the episode. But a project is more of a one-time thing like a launch of something. A launch of a website, a launch of a podcast, a launch of a course. A program is an ongoing effort that you and or your team has to continue to do over time. We're going to talk about some strategies on how to approach each of those things, how to manage and process those things as well so that you can have more efficiencies in your business, and that's exactly what we're here to help you with today. So before we get to that, cue the intro.

Announcer: *Welcome to The Smart Passive Income Podcast, where it's all about working hard now, so you can sit back and reap the benefits later. And now your host—his life's goal is to be known for changing education in some way—Pat Flynn!*

Pat: Hey hey, what's up Team Flynn? Welcome to Session 360 of The Smart Passive Income Podcast. My name is Pat Flynn. I'm here to help you make more money, save more time, and help more people too. And today again, we have my Editorial Director, Janna Maron, to teach us a lot about managing projects and programs.

Each of us who is doing online business has to know these skills. So sit back, relax, or take notes, and listen in as we get schooled by Janna, who we just love on our team because she's amazing. She is the reason why a lot of what you are listening to and see and interact with exists in my brand. So here we go, Janna Maron everybody.

Hey Janna, welcome back to The Smart Passive Income Podcast. Thanks for being here again.

Janna Maron: Hi Pat, thanks for having me back.

Pat: Yeah. Since May 25th 2016, which is [the last time you were on](#), you and I have gotten to know each other even better because we've been working even more closely together with a lot of the things going on in the world of Smart Passive Income. So first of all, thank you for . . . And I don't know if you know, for those of you who don't know much about Janna, the other episode we did was about our editorial calendar. So everything that you see published on the podcast, on the blog, you can thank Janna to make sure that all kind of happens on time. So thank you.

Janna: Yes. You're very welcome. Happy to do it.

Pat: So we're not going to dive into your origin story. We did that in the last episode. In this episode, we're just going to dive right in because in the last one, we talked about editorial calendar, how to keep up with it and how to get ahead.

Today, we're going to talk about project management. So you have a big course that you want to come out with or a podcast that you want to set up, and how do you even plan for that such a big thing with a lot of micro goals in that? And I'm excited to dive into your brain to understand how even we do it for the benefit of everybody else listening. But also project management versus . . . Or projects versus programs, and really what the difference of that is.

So why don't we start there? What is the definition of a project to you versus what a program is? And then we'll kind of define how to manage each.

Janna: Sure. I think of a program as something that is an ongoing function of your business or your content creation, and it encompasses a lot of mini projects strung together. So you could think of something like your ongoing podcast episodes. Every episode is effectively a mini project, but you're going to ideally have an ongoing publishing cadence for those episodes. And so that's a program because it's the same project, like mini project schedule that repeats, and it's ongoing and continuous, whereas a project is a much bigger, longer, usually higher stakes, and it has a definite deadline and an end date. So that would be something like you mentioned, a course, an online course or a book or an event. So something that's like, a usually much more like a one-time kind of big thing as opposed to something in your business that's ongoing and encompasses, like I said, a lot of mini projects strung together.

Pat: Gotcha. And many businesses will have a mixture of each of these things just like ours. So in addition to the podcast, what are some other programmatic elements that we have going on, that you help manage?

Janna: Yeah. So everything that you see on the blog would be considered a program. It's anything from the regular blog posts that are published. I mentioned the podcast episodes already. You have two podcasts that you're currently doing on a weekly basis. Emails, any ongoing editorial emails that would be more like a newsletter, weekly or monthly. That's a separate type of email function from a launch, where a launch is happening and you're doing marketing emails. That's what I would say where emails cross over into the project category.

Pat: Got it. And then what are some project categories that we have other than that?

- Janna: Projects for us include books, courses, events. I'm less involved on the event side of things, but any time you do a launch for your courses, even that's almost like . . . Even if the course is done and available, your launches are also ideally considered projects because you have a launch plan for each time you're doing like, a webinar that includes a series of emails and maybe some social promotion to get people to opt-in. So those are the different types of projects that we often do.
- Pat: Got it. Are there major differences in how to manage each of these things? What would be the high level sort of differences between how to manage and plan for each of these?
- Janna: You mean still the difference between programs and projects?
- Pat: Yeah.
- Janna: Yeah. Okay. So for programs, the ideal program is kind of set up and running on its own, or maybe not on its own, but just with daily kind of oversight and management to make sure that things are running as they're supposed to. So a project on the other hand, has these phases, which maybe if you're ready we can transition into talking specifically about projects where you want to do some discovery and some strategy upfront before you dive into production, post-production, and launch. And so with a program, you're still doing your discovery and your strategy, but it's kind of a one-time thing because then once your schedule is set up and running, you don't have to continue doing discovery and strategy unless you're wanting to change or add or do something new with an ongoing program. Does that make sense?
- Pat: Makes complete sense. Thank you for that definition.
- Janna: Yeah.
- Pat: And so let's dive into project management. And let's just take a hypothetical example. You and much of the rest of the team are very well-versed in the world of books, in publishing books and

those kinds of things. I mean we could take anything and make it a project, right? Like a course or the . . . I would assume that the launch of a podcast would be a project and then the ongoing part of it would be the program, right?

Janna: Exactly.

Pat: Okay. I got it right. So let's just take a book, and we're in the middle of processing a book right now and so can you tell us exactly how we plan a book? A book is a huge thing and it encompasses a number of moving parts and pieces and deliverables, and it just drives me crazy just thinking about how many things are involved. So this is why I'm very thankful I have you. So without overwhelming us, tell us, if we're planning on writing and launching a book, like how do we even begin and what are the different components and how do we manage that?

Janna: So I mentioned the sort of like, four phases of projects. Discovery and strategy, I kind of group those two together, production, post-production, and launch. So with a book, your discovery phase—and really any project, the discovery and strategy phase is like, you have an idea, okay great. This is the phase where you start to explore and define what that idea really is. So for a book, this is where you start to talk about what's the focus, what are the themes, who's the audience, and you really identify all those parts of the book and that helps you to inform how you go about doing your strategy and planning around, “Okay. We want to start engaging these type of folks in preparation for when the book is ready to release to them,” and start to kind of cultivate and develop that interest with the group of people who would be your ideal readers, right?

And your strategy phase is in four . . . Like I grouped discovery and strategy together because you're doing a lot of research and gathering inputs. So you're researching maybe your ideal audience. You're also collecting inputs from stakeholders who would be involved with helping you produce the book. So if you have a team, anyone who's going to touch that project is a stakeholder because they have a part to contribute and they have input on

how things could work, or not work or the best way to do things, or how long things are going to take. So it's really important to get the stakeholders to give input and just validate the plan that you're creating before you give them a plan and they say, "Hey, wait a second. I need way more time to do this part of the plan and you haven't given me that in your schedule."

Pat: So the discovery and strategy phases, is this also, especially if this is your first time doing something like this, is this where you're just trying to figure out, "Okay. Well, this is what the roadmap is probably going to look like from this point forward and let's just discover what all those pieces are even before we start producing this book?"

Janna: Yeah. Exactly. So your strategy is definitely part of . . . It's the planning phase. It's where you kind of think about the project as a whole, think about an ideal target deadline or launch and then start to work your way backwards into okay, what are the high-level milestone deadlines along the way to obtain that goal. This is where you start to think about breaking the project into smaller, more manageable chunks.

So for example with the book, the smaller, manageable chunks of a book would be chapters. And you start to think about, "Okay, is it reasonable for . . . " We're thinking about like, production would be the second phase. So how quickly could you conceivably write, you know if it's a full-length book, somewhere between 10, 15, 20 chapters. Is it a chapter a month? Do you want to go faster than that, slower than that? So that's all part of the strategy and discovery phase.

Pat: One superpower that you have that I have known and had learned very quickly after you obviously got to know me, was me being a visionary, somebody who has huge ideas that might not know how much time certain things might take; you are very good at bringing me back down to earth, essentially. Not in a sort of debbie-downer kind of way, but more of a realistic like, "Hey Pat, okay, this is great, but realistically like let's figure out how many books we can write this year." Because remember when we wrote, *[Will It Fly?](#)* we were

beginning to plan to write four books in one year, which like, now that I'm even saying it out loud is I'm just like, "What was I thinking? That's like, ridiculous."

And then literally, you proved to me, you showed me a spreadsheet, you're like, "Okay Pat, you want to do four books this year, here's how we're going to do it." And you laid out the plan, you showed me a spreadsheet, and you had four books like overlapping each other on when certain things were happening, when editing was going to happen versus when writing was happening versus when marketing was going to happen for another, and it just became very clear to me that like, "Okay, that's not going to work or I will drive myself crazy."

So I think for people like me and a lot of people who are listening are people like me who just have these big visions—"I want to write a book. I have these big, great ideas"—even if they're working on their own, what advice can you give them to bring them back down to earth? Not to say like, "You can't do those things." But how can we plan to actually see what is possible versus what we are thinking?

Janna: I love that you said I helped you be a little more realistic. Because I do try to maintain like, a realist perspective, and it can often be perceived as a more pessimistic, negative perspective when I'm the one who has to say, "Hang on a second. We can't do all of those things, or let's look at what it would take to do all of those things if we were really going to try."

So really it comes down to experience. Like, producing content on this scale is something that I have years of experience with. So all of that experience informs how I think about planning projects. And then as we were talking about in the discovery phase and the importance of talking to other stakeholders who are participating in producing whatever the project is, that's really the stage where if there's a component or part of the project that you're unfamiliar with or you've just never done before, you really have to rely on those

who have done it, who can inform the realistic answer around how long it's going to take.

And then my little kind of like back-pocket secret is, I've always build cushion time into a project schedule, just so that if and when—it's usually pretty inevitable that the schedule has to shift and in some way sometimes more than others, but that cushion is built into the schedule so that, okay maybe if we make up a little bit more time at a future part of the project we could still hit our like ultimate final launch deadline.

Pat: So I'm going to put you on the spot really quick.

Janna: Okay.

Pat: Let's say you don't know me or you just gotten introduced to me, and I'm this entrepreneur who wants to write a book and I tell you, "Janna, I have this big goal. I'm going to write a book and I'm going to have it finished and launched in six weeks. That's my goal." How would you reply? After keeping the laughter in.

Janna: I know, right? I'm like, "Ugh, do I laugh out loud?"

Pat: And then, you know, I go, "Oh well, my buddy Johnny did it and he's proven to me that it is possible." So I'm going to throw that into the loop as well.

Janna: Yeah. So right away my questions are, is it a print book? Is it an ebook? How long is the book? Did he write the book himself? Did he have it ghostwritten? Is it professionally edited? If it is, that takes more time. Is it professionally laid out, or is it just a Word doc that he uploaded to Amazon? So right away my brain just kind of starts firing off all these questions that help to inform the requirements of the project and whether that goal or that timeline is actually attainable.

- Pat: Gotcha. So thinking about the requirements, and then so I go, “Okay. Well, let’s not worry about Johnny right now, but I’m special and I’m going to hunker down and write this book.” And then like, how would you kind of bring me back down to earth for that, without discouraging me?
- Janna: Sure. So I would ask, “Have you ever written a book before or is this your first book?”
- Pat: It’s my first book.
- Janna: Okay. Great. Congratulations on writing a book. That’s really exciting and definitely a smart move for building an audience and gaining a following. What’s your experience with writing? Do you know how quickly you’re able to write?
- Pat: Well, I write a blog post every week, so I think that if I just hunker down, I can probably get it done.
- Janna: Mm-hmm. How long are your blog posts?
- Pat: 1,000-1,500 words.
- Janna: Okay. So do you have an idea of how long you want this book to be?
- Pat: Probably average business book, 30,000 to 40,000 words, maybe 50,000 if I’m in the flow.
- Janna: Okay. So do you think you could write on your book every day? Once a week? How much time can you commit to writing on your book?
- Pat: Well, I am dedicated to this so I will be writing daily.
- Janna: Daily? Okay. In that case, if you write a blog post once a week and it’s about a 1,000 to 1,500 words and you want your book to be 40,000 words and you write 1,000 words every day for 40 days, you could have a draft of your book done in 40 days. Do you think that’s

doable and realistic for you?

Pat: A draft in 40 days and that is five weeks-ish, six weeks. Okay Janna, I think maybe I might need to give myself a little bit more time. But yeah, okay, let's say I can finish in 40 days 4,000-word book, then it's good to go, right?

Janna: Well, if you want to just release it into the world as it is, sure you could do that, but I would recommend at a minimum having it edited, because then you can have somebody who is professionally trained to help you shape that book into something that is ready for a reading audience.

Pat: Well, doesn't Google spell check for me? So I don't have to worry about that.

Janna: Yeah. Google does spell check, but you know what?

Pat: Keep playing. Keep playing. This is fun.

Janna: Okay, but unfortunately, editing is much more than spell check. So think about what happens if you're writing in the flow and you're getting into the groove of your prose and it comes out a little bit more like stream of consciousness than a fully structured and well-thought-out and organized structure for a chapter within a book that's 40,000 or 50,000 words. So a professional editor is somebody who helps you really organized and structure the book in a way that is going to be ready for a reading audience.

Pat: Okay. How long would that process take with 40,000 words? Like, I can hire somebody to do it for me, but how long will that take?

Janna: That depends also on how well the first draft comes out and how long the book actually ends up being. So your goal might be 40,000 words, but what if it ends up being 50,000 or 60,000 words?

Pat: So then the decision is do we cut down, or do we make it that long

and that influences everything?

Janna: And that's something the editor can help you with as well.

Pat: Okay. Let's just say, first draft was medium decency. It's going to remain 40,000 words, like just ballpark how long would it take to work with an editor to structure it properly? And would they just do that for me or will they just give me sort of suggestions and then I actually have to go rewrite those sections?

Janna: It's a little bit of both. So typically, the first phase of editing would be developmental edit, which is what I was describing about looking at the structure and the organization of the book. And if there's any additional like, missing areas or sections that the editor recommends still is written, and in that case, the editor would make suggestions to you for you to go back and spend some more time working on those revisions.

So an editor could probably do, on a 40,000 to 60,000 word book, you know, assuming this person is focused only on your book, that work could be done probably in two weeks, three weeks max. And then it's again back on you, as the author: How long would it take you to implement those revisions and come up with a revised draft?

Pat: So we're already approaching 10 weeks into this, so my 6-week mark is probably a little bit off if I want to do this right.

Janna: Right.

Pat: End scene. Okay. Great job, Janna. Thank you. That was fun. Hopefully that just gives you a little bit of insight, for those of you listening, on the kinds of conversations you should be having and maybe the kinds of questions you can ask and you should be asking. Because there's a lot more to a lot of these bigger projects than the eye would have you see upfront or on the surface. And this is why people like Janna and her experience are so valuable.

And so I know a lot of people right now are like, “All right. Really what I need is a Janna. Where can I go get a Janna?” And essentially Janna, why don’t you let everybody know kind of a little bit of your job description and your role and maybe what the title is? That way people can go and perhaps seek people like you, and if you have any tips on how to find somebody that really blends well with your stuff that would be helpful too.

Janna:

Sure. So my official title with Flynnindustries and SPI is Content Director, which means I am in-charge of overseeing all of the content initiatives for SPI. So that does include the blog and the podcast and the sort of ongoing content programs that we have already talked about for the brand. And then of course, special content projects, which include books and courses primarily. We will also do longer PDF downloads and lead magnets, so that would also fall under my purview when we have those projects arrive. Sometimes they’re longer, sometimes they’re shorter. You just recently published a big, epic guide, your Epic Guide to Affiliate Marketing, so that’s a different type of content project that was something that I was leading on as well.

So for somebody who does what I do, I would definitely say if we’re talking about content you want to look for somebody who has experience working with content. And that’s usually somebody who has . . . The position would be something with content or editor or editorial in the title because that person can help to think about the way that your audience will be engaging with the messages that you’re producing and the best way to craft those messages and plan and schedule those messages, that’s why the content editorial experience is important. But if it’s not content related, then that’s less important, and in that case looking for someone who really is a true project manager.

And I think we did cover this a little bit in the last episode I was on, Pat, where in the content management space, there’s overlap. It’s like, you want somebody who has experience with the content and editorial and the project management so it’s kind of like a specialized type of project manager, if you will. Does that answer

the question?

Pat:

Yeah. Absolutely. Thank you. That's super helpful. So we gave an example of a project and how to potentially think through that and manage that along the way. Of course, there's going to be adjustments and you want to work backwards from a deadline that is a realistic of course with cushion in there to keep it safe, and I think hopefully that'll help people with future planning for their big launches and big projects in the future. But let's talk about programming. These are the things like, your blog that you consistently published to, your podcast, your YouTube channel, whatever the platform might be, your social channels, anything that requires sort of programming or sort of recurring elements each time.

I love this topic because it allows us for opportunities for optimization for getting time back, where initially when you first tried running a blog post or creating a podcast episode, it would take hours. You're probably seeing as you do it more often, it takes less hours, but when you start to think about it programmatically and think ahead, a lot of what we talk talked about on the last episode, [215](#), with your content calendar, and then having a team to support that, I mean, it can be a machine and that's what SPI has been for the past couple years, especially in the podcast and blog front. It's felt like a machine. And that's really honestly what has opened up more time for me and Caleb to do some fun things and experiments on the YouTube front or else I wouldn't have had the time to do that. So that's really fun and exciting, but it is really all because of what Jenna has helped put together for programmatic elements to help support those things.

So can you share how one might approach, if they have a single channel, how to plan and manage that programmatically, to get the most time back and to be the least overwhelmed, I guess you could say?

Janna: Definitely emphasize the importance of planning, even with project management, project or program. I can't stress enough the importance of planning because that's really where you spend your time thinking about, "Okay. What do I want to do on my blog for the next six to twelve months?" And once you have some sort of framework, whether that's like, you choose a focus for each month of the year or you have some content pillars and you're going to rotate through those pillar topics on a weekly basis. It can be whatever framework you want it to be, but establish a framework so that you can easily generate ideas around the framework and begin to plug those ideas in to your calendar, where it makes sense based on what else you have going on in your business because this is really where you can start to get advanced with your planning around and aligning your content with your business launches.

So for example Pat, if we're going to go back to the book example, if and when there's a book you're ready to launch, whatever that launch date is in the future, you could align your ongoing program content to be around the similar book topics leading up to the release of the book. And it just kind of primes your audience, and gets them ready for, "Oh, now I'm really ready to like, buy this book when it's available."

So the planning is super important. And then from there, the thing that that does for you is okay, let's say you have three to six months of topics planned out for your blog and you're going to write a blog post every week—as soon as you sit down to write, now you know exactly what you're going to write. You don't have to spend any time thinking or brainstorming or coming up with a topic because that's already been decided. So what you're doing is taking out that sort of decision time and the just kind of pre-writing time. That's batched all together during your planning time so that when it's writing time you can truly sit down and just write.

Pat: And that's been huge for us because I remember when it was just me thinking about what I was going to write about next or podcast about next, it took so much energy out of me. And I would always

reserve that for the same time every week. It was, as soon as I hit publish on one thing I would start to begin that mode, and it was so exhausting and I wasn't always in the right mode for it. But what we've done is we've had these quarterly meetings that bring multiple heads together so that we can go, "Okay, well, what is . . . "

First of all, we have year long meetings to see, okay, where are our launches and what's happening throughout the whole year. Then we come together again throughout the year to determine for our future purposes, okay like, what content is going to be created to support that and what's going to go where. And so when it's my day to write, which is usually Mondays, I know exactly what I'm already going to be writing about. I already know ahead of time. That way, my brain is even already sort of ahead of . . . And way past this sort of what am I going to write about sort of mode.

So it just becomes so much easier because I can get in the writing mode much quicker and I optimize my time and the writing is better and I'm not exhausted from just the thought process of what am I going to write about. I'm exhausted when we plan though. Like I'm not going to pretend—like, planning a whole bunch of things together is not easy. It's definitely worth it though.

Janna: Sure.

Pat: So then when you start to involve a team Janna—which, we have an amazing team that help support us on the content front—how do we get people to do the right things at the right time? I've always been very curious about that. Like, how have you been able to schedule that properly so that as soon as I write a draft, it goes to somebody who then edits it and then it goes to somebody who then posts it, who then gets . . . There's a trigger to create the image that goes along. Like how do we start to figure all that out?

Janna: Yeah. So that's also part of planning because once you have your topics planned out for the year, there's a different kind of planning that is involved with just planning the workflow and that's really your post-production. So you're actually generating the written content or the audio content. That's your production phase, right? So once

that's created, you're into post-production and that's where our team starts to support the ongoing content that we do for SPI. We handle all the post-production. And that really is another part of project management because you're thinking about, okay what are the steps that happen, as soon as Pat has a blog post drafted what happens next? Somebody reads it and gives some feedback and sees if Pat wants to do any revisions.

What happens next? Somebody does a copy edit on that blog post. What happens next? Somebody takes that blog post and formats it and configures it in WordPress. What happens next? Somebody creates a graphic and uploads it to the blog post. What happens next? Somebody does a QA on that post make sure all the links go where they're supposed to go and that there isn't any funky formatting happening. What happens next? Then it gets scheduled to publish and ideally it's scheduled and in the queue, ready to publish in advance of its publish date, so that when it is the publish date, it just automatically publishes on its own. And then there's actually some steps that happen after that because we will make sure that . . . We've got a couple of social messages that we write and schedule for you automatically to go with that blog post.

So what I'm doing is first of all, figuring out what all those steps are, talking to the people who are contributing to each one of those different steps, asking them about their workflows on other projects that they may have going on, how they kind of set up their work week. If there's a day of the week that they prefer to have these tasks assignments land for them, how long different things take, how much time does somebody need in between copy editing the post and getting it formatted or could that also happen on the same day, for example. And we use a tool called [CoSchedule](#), which we talked about in the previous episode I was on, that manages this entire task workflow where each type of content has what CoSchedule calls a Task Template, so all of those tasks I just rattled off live in there as like a checklist basically. It's pre setup with relative deadlines for each task. [Full Disclosure: As an affiliate, I receive compensation if you purchase through this link.]

So if the blog post is going to publish on just say hypothetically Monday, March 1st, I don't know if that's actually a Monday, but then the task right before that would be due say fourteen days before the published date. So I don't actually have to manually put in the deadline, the software is intuitive and has that relative due date and it will automatically land on the appropriate date once I attach the task template to that piece of content. Wow! That was a tongue twister.

Pat: Attach the template.

Janna: Yeah.

Pat: CoSchedule has been huge for us for managing these processes and it's so cool to see that these templates, which . . . We create the templates, right? They're not like boilerplate, ones that we get from CoSchedule. Although I'm sure there's examples that we can pull from. But we create it for us and then we just open it up every time we have a new blog post that's going to be published, and it's just the same each time.

Janna: Right. And it lets you create as many templates as you want. So there's a template for when you're writing the blog post, Pat. There's a template for when we maybe we have a guest post. And so there's a separate task template for that type of blog post because the workflow changes depending on who's writing the post, right?

Pat: That makes complete sense. That's awesome. Are there any other tools that you use in the line of work that you do for me that are really helpful for management of everything?

Janna: So CoSchedule is definitely the number one tool we use for our ongoing content programs. We also use Google Drive and Google Docs to support that. We do all of our planning, like the planning of the posts and the podcast episodes in a Google Doc spreadsheet—

Pat: Here's what happens guys, when it's my day to write, I go into CoSchedule and I see it's my turn to write this particular post. I open that particular task on CoSchedule. Inside the comments, Janna has already placed, or somebody on our team has already placed a Google link to that document with that title of that post already in there, and it's just ready for me to write. And it's just like, I literally have nothing to do but what I know I do best, which is just go in there and write. Like, she's just helped me and CoSchedule has helped me and the other teammates have helped remove all those little frictions so that I can just do what I need to do. It's been so amazing. It's really helped me a lot, Janna.

Okay, so sorry to interrupt. I just want to give people a feel for what can happen when you do a little bit of work to plan ahead and set these systems up. It's just better now. It's cool.

Janna: Yeah. I'm so glad to hear that. I mean, that just makes my little nerdy planning-heart happy. And Pat, one of the reasons, the main reasons we use Google Docs for the blog posts is once you have your draft in there, somebody comes behind you and reads it and we do all of our editing right in the Google Doc. And so if there's any questions or any back and forth that needs to happen, it stays in the Google Doc until the post is finalized, so that all of that back and forth with the team is really easy to facilitate in the shared Google Doc. And then once the post is finalized, we take it and format it in WordPress.

Pat: Nice. So other tools will be on Google Drive.

Janna: Yes. So for projects that are not ongoing content programs for us, we started using a tool, I think it was probably about a year ago, a tool called [Airtable](#), which is . . . Honestly, sometimes I have a hard time describing it. It's sort of like a spreadsheet, but it does way more than just a spreadsheet. And it allows us to plan our projects and group them by our deadlines and by projects. And it's a much more intuitive interface for managing data. And effectively, if you think about it, tasks and deadlines are data. So it's a data management tool that is fun to use.

- Pat: Yeah. It says “part spreadsheet, part database and entirely flexible. Teams use Airtable to organize their work their way.” So it is kind of hard to describe. Parts of it do look a little bit like [Trello](#) but to me, mostly it looks like a spreadsheet. But the way, we’ve used—it allows for like, drop down menus and other things that when tasks get completed we can click them off and then they move somewhere. I don’t really know exactly all that goes on there. You guys are just super nerdy with all this stuff, but have we used Trello in the past, and did we enjoy that? I think I remember we used Trello before, but . . .
- Janna: You know, I feel like maybe the team was using Trello right when I came on board, and we—
- Pat: That was a popular one that people use.
- Janna: Right. So the one thing that’s interesting about Airtable is you said, it looks like Trello or a spreadsheet. Well so what happens is you put all your data in there and then you can configure the view however you want. So if you prefer to look at it like a spreadsheet, you can do that. You can also change it and it will automatically display your data as the kanban view, which is what Trello is. And you can also ask it to do a calendar view. So it’s pretty slick.
- Pat: Yeah. I’m looking at this. It looks like it’s pretty versatile. You could use it for novel planning, screenwriting, story planners, you can use it for copy management, growth . . . There’s just a whole bunch of stuff. I don’t want to get lost in there. Now, anyway.
- Janna: Yeah.
- Pat: Okay. Cool. So we talked about project management. We talked about programmatic management. When you have . . . A little bit more on the team. Like when you have other people involved, how do you ensure . . . And I know this is coming from, let’s say the entrepreneur who’s listening, who they have a team, they don’t necessarily have an integrator or Janna, but they have team members doing a lot of these tasks. They are essentially playing

your role. How do you keep people on task and how do you motivate them and just how do you keep spirits up?

Janna:

Yeah. So I mentioned this I think when I was talking specifically about the planning stage, but I'll say it again: Just including all the stakeholders when you do the planning so that the plan is validated by the people who are actually doing the execution. And then that plan should absolutely include regular meetings where the team knows that's when they're expected to give status updates on their progress, and that's also the opportunity for you to check in with the team and just make sure they have what they need. Even if they're not making progress, well that's where you can probe and find out why. Asking questions about you know, maybe they don't have an input that they need and that's what's blocking them, or maybe they're overwhelmed because they have too much on their plate. So those meetings are for more than just, "Hey, what's the status update on your project?" It's just to check in with your team as a whole.

And ideally entrepreneurs and people who run businesses are doing this with their team on a regular basis. So really understanding what your team needs to continue to move forward and make progress. And this is also where your role is to help them make decisions. So if you sense that somebody is getting to a point where they seem to be hitting a block and they're not able to get beyond whatever it is, this is your chance to talk through and come up with some creative solutions that maybe help them. Just offer a different perspective on how the thing could be accomplished or done a different way, or move forward without this one piece because you can still do some of this other stuff, and then add the missing piece when you get it, kind of thing. So that's the opportunity for you and for the team really to help each other do some creative problem solving if there is something that's causing a delay or a block.

And then the accountability feature is important, and that's partly why we use things like CoSchedule and Airtable because everyone has direct line of sight to what the schedule is and who's assigned

what tasks and when those tasks are getting completed. There's a check off feature in all of these platforms so that everybody sees what's done and what's still outstanding. And then with the schedule, it's really about making your milestone deadlines along the way so that you can measure your progress.

So back to the book example. If you're doing a 20-chapter book, you can measure your progress by looking at, "Oh okay, I've done 10 chapters so I'm 50 percent of the way there." And that helps keep everyone . . . Everyone can help see how much is left and know that okay, we are making progress and not feeling like there's no end in sight.

Pat: Yeah. I love that. That's perfect. Thank you so much for laying that out for us. And the final question I want to ask you Janna—and this is been really helpful, and I hope everybody is enjoying the process of learning how to better manage the processes and people that are in their business. For the person who's listing who is just starting out with learning how to optimize their workflow, they've been scrappily putting everything together, planning on a week-to-week basis, and really feeling under the weight of all the things they need to do, what is the very first thing they should be doing in order to help relieve some of that weight off their shoulders?

Janna: That's a hard question. I really would probably spend the time just doing a brain dump or making a list, a bullet point list of all of the things that is causing the overwhelm because then you have it all in front of you, and that's what you can start to organize with. So if it's Trello, it's one list with everything on it, and then you can start moving things into organized or dedicated list. Or if it's Airtable, it's just everything in one main database view, but then you start to categorize things and group things together. Because what you want to do is figure out a way where you can look at smaller components, because the thing that's causing the overwhelm is, "Oh, I have to write this whole book and publish it." Or, "Oh, I want to create this course and all these videos and all these written content and this platform that I'm unfamiliar with." That's the thing

that causes the overwhelm, is when you think and stay stuck in thinking about the whole thing.

So the beauty of project management I think is you can just focus on one small part of the project at a time and only worry about that one thing that's right in front of you, because as soon as that's done, you move on to the next thing.

Pat: I love that. And I also love the idea of just brain dumping whenever things seem crazy. Like, let's list it out loud and actually visualize what's going on because our brains don't necessarily know what's going on until we start to see it. And then we can even go, "Why are we doing this? Like, this stuff here that I'm looking at like, this doesn't make sense to be here. Like, let's remove that off our plate. All these things, like I just noticed that these four things right here, I hate doing these things. This could be a good opportunity to find somebody else in the team or a person or a software to do all those things." And you can start to organize that.

I think that's definitely the best tip, is to just lay it all out there and be honest with yourself, but also don't be afraid to make changes because it has to change or else you're just going to be under all this weight all the time.

Janna: Absolutely. That reminds me of . . . Are you familiar with the new show that's recently come out on Netflix, the . . . [*Tidying Up with Marie Kondo*](#)?

Pat: I didn't that was a show now, but I know who that is. And she's the author that book, right?

Janna: Yeah. So her book is [*The Life-Changing Magic of Tidying Up*](#). And now she has a show on Netflix called Tidying Up. And her process for any category of possession in your house—and she always starts with clothes—is you take out all of your clothes from wherever they are in your house, closet, drawers, other closets, if you have clothes in more than one place, you dump everything on the bed and then you take each item one at a time and you decide if it

sparks joy. And if it does, you keep it, and if it doesn't, you say thank you and you let it go. And the principle is very similar where, oh my gosh, now that you see all of your clothes piled on your bed in one place, yes it's overwhelming, but you also start to think, "Oh, do I actually need all of this? Maybe not. Is all of this serving me? Maybe not." And you just start to make steps and progress, one thing at a time.

Pat: Yeah. That's great. Now I'm going to watch that show because I think that's something I could do in certain areas of the home. I think I saw something on Twitter the other day. She had mentioned that—this is sort of a side random thing to finish off, but I know you love books obviously, and are writing books. She had mentioned to do the same thing with books, but to me I'm like, you know what? I keep my books, like, I want to keep all my books. But how do you feel about that?

Janna: You know, so the way she does it in the books, is she's got different categories and you're supposed to progress through the categories of possessions in your home, and books is its own category. So it's like clothes, books, papers. I forget all the categories, but when I read the book I definitely had this reaction of like, "Ah! I don't think I could do that with my books." But then I did.

Pat: No way.

Janna: I did. Yeah. Because what happens is, it happens with anything else that you are fond of, right? Like for some people, it's clothes. For some people, it's books. For one person on one of the episodes, it was just like, sentimental papers, like letters and cards and anything like that can just build up and kind of like, explode in your living space over time. And it really just forces you to think about, "Okay. Why am I keeping the things that I'm keeping? And what are the things that really, truly bring me joy in my life?" Like, "Am I keeping these things because they bring me joy or am I keeping things because I think I have to or because I think they demonstrate how many books I've read?" Or whatever the case maybe.

Pat: Well, maybe some of the listeners could go through the same exercise with the podcasts that they listen to and hopefully if you do that, which may open up more time to take action, you keep this one on because you understand hopefully how valuable it can be for you. But anyway, just thank you again Janna for coming on. I honestly don't know if I'm going to keep that last part in there because I don't want to hint to people not subscribing . . . but hey, you know what? If you love the show, you should stick around. And if you don't, you should leave.

I mean, I hope that you go and do the things that you love and listen to the things you enjoy and I just hope SPI is one of those things. And I know I've enjoyed listening and hopefully you've enjoyed listening to Janna here as well. Janna thank you so much for being a part of the team, for sharing all this information, for helping us live a less messy life as a business owner.

Janna: Yes. Absolutely Pat, thanks for having me.

Pat: Thank you.

All right. I hope you enjoy that episode with Janna. Again, you can see her handiwork everywhere related to Smart Passive Income, and the things that get published and promoted on the blog, on the website, on the podcast, and all the sorts of things. So she is the one behind the scenes, helping to make sure everything is running so that we can meet our deadlines and ultimately better serve you.

So let me know what you think. If you want to leave some comments or have any thoughts about this or follow up questions, I'd be happy to pass that on to Janna for you. If you go to SmartPassiveIncome.com/session360, One more time, SmartPassiveIncome.com/session360. You can leave comments there and also get all the notes for the tools we recommended and the resources and all those kinds of things.

So again, thank you so much. I appreciate you. I know a lot of you are excited to get to know more of my team down the road. You've



already listened to my CFO and COO, Matt in [Episode 354](#). We got a really great response with that. That's when we announced that I have this big team and I'm able to better serve. And as many of you know, this is new for me. I've been myself, my own employee for ten years up until January 1st, and it's been a really fun thing to actually have real people. And yes, I've worked with other people before in a contractual manner or worked with agencies, of course there's people there too, but having real people who are real employees, who are not just like, helping you out and supporting you fully, but also that you rely on and rely on you. It's pretty amazing. It's like a family. It is a family. And Janna, I'm very thankful that she's a part of it and I hope that is inspirational and helpful for you.

It took a long time to get here, and of course you don't have to hire somebody to help yourself program and project manage. You can take a lot of the things that we discussed today and implement them right now in your business. So just take the most helpful and useful thing and start to try that and test it out and experiment and see what happens. If you want to share this with the team member, feel free to do that. And if you have any follow-up questions, again, SmartPassiveIncome.com/session360.

Team Flynn, you're amazing. I appreciate you. Team Flynn for the win.

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