DESIGN GUIDE

THE NINE TRIANGLES DESIGNER'S HANDBOOK



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Chief Executive Officer

GUIDE VERSION
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Welcome!

It Is with great pleasure that I welcome you to BlitzMetrics! We are very excited to have you on board with us!

This guide is for all VA designers who have intermediate experience in Adobe Indesign and Illustrator.

This guide is also perfect for owners and agencies who want to train their VAs through this guide and customize it for their brand. And we also have a corresponding course for design VAs, since we have courses on everything we do.

In this guide, you will learn the Blitzmetrics branding as well as working, skinning, and redesigning guides. You would also learn to prepare presentation decks and course creation processes.

Professional branding immediately gives people the impression that you're an established, confident, and trustworthy company. That is why you need to learn these basic principles before you start designing.

We are looking forward to getting you ingrained in the design team. We are incredibly grateful to have your skills to round out the team and head towards sure success!

Dennis Yu
Chief Executive Officer
BlitzMetrics

Important Reminder

Never hit the "request access" button, since it generates a ton of emails to other team members. If you need access to documents, Google Drive, or anything else, reach out to your manager to request access.

If you are a member of Office Hours, please see operations@blitzmetrics.com or ask in the Facebook group. If you are not a member of Office Hours, you can join here: http://express.blitzmetrics.com/office-hours-with-dennis41355373"

The BlitzMetrics Logo

This is our logo.
Our logo is simple, clean, and crisp. It easily translates through most forms of media that we use. Keep in mind that simplicity is key when working with our logo, the design should not create conflict with the logo's design style. It is important to note that when working with our logo, it is a must that we work on it through Illustrator and not photoshop because vectors preserve scalability and quality.

Logotype
This is what we use for most of our materials. Make sure that the text and fine lines are still legible when the logo design is scaled down.



How we use the logo
We usually add the logo to the lower left side of our printed materials and guides. Logo use in our videos can vary from this format. Be watchful for overuse of the logo, it should be enough for the logo to show up once or twice per page unless it is needed to occur more (ie. diagrams that need our logo to show up multiple times).

Also, be aware that the logotype is not to be used heavily in our designs.

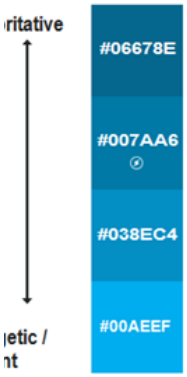
Color Palette



Using color to focus content

We have a color we call BlitzMetrics Blue, our other colors stem from that particular hue of blue. Lighter colors are best suited for design purposes when other content, such as images or words, need to be the focal point.

This isn't to say we can't stray away from the palette. Just be sure to take function over form. The boxes that have our signature bolt are part of the basic palette.



BlitzMetrics Blue, the swatch with the bolt icon, is our main hue of blue. Used mostly in our logo, it is also good for headers and sub-headers when used sparingly. #00AEEF is used for our hyperlink style.



Our yellow palette is good for adding contrast to our guides. It is great for adding splashes of color to compliment our blues. Not great for light font styles against a white background though it may work when used with a heavy font style and large font size.



Top and middle green works great against a white background.
It can be used for headers and/or sub-headers. Green is a good alternative to a blue color scheme with yellow/orange as its complimentary color.
#D7DF23 green is not great for light fonts against a white background.



#222323 is our main text color. We refrain from using actual black and prefer grays because it is less straining to the reader's eyes. We have a lot of content and we have to make sure we get and retain the reader's attention. Lessening the harshness of the text color helps with that. The lightest colors in our pallette work great with the two darkest grays when used sparingly.



Reds are the trickiest color to use in our palette. Mainly used for catching attention or as a warning system. Adding a splash of red to a note makes it seem more important. Red isn't recommended for use as the main color scheme since it clashes with our BlitzMetrics Blue color palette. It is also good for highlighting text.

* Here's an example of a note that uses red to add emphasis.



Beige is good for strokes on paths and/or lines. It is great as a base color for shadows. You can play with the opacity to serve your needs.

Gradients and Color Combinations

Gradients give depth to our images. By using gradients, we add an additional dimension to an otherwise plain design without contradicting the clean design theme. You can mix and match colors from our palette however you see fit, just remember that subtlety is key.

Subtle progression
Make sure that the progression of the tint is slow and subtle from dark to light, left to right. Jarring color changes and combinations look weird and are reminiscent of 90's WordArt.



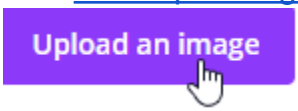
Basic combinations

Here are some basic combinations for both light and dark themes that you can use.

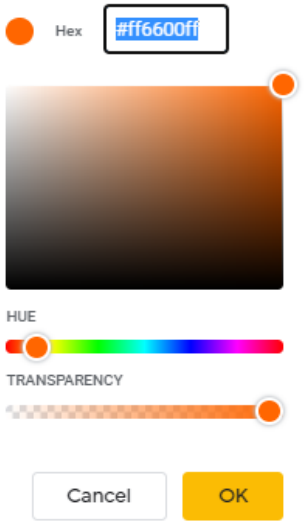


How To Get HEX Codes of a Website Logo

1. To change the colors, add the client's logo. You need to get the HEX codes of the client's brand colors. One way to do this is by going to the client's website and getting a copy of the client's logo.
2. Go to "Canva palette generator" and upload the client's logo.

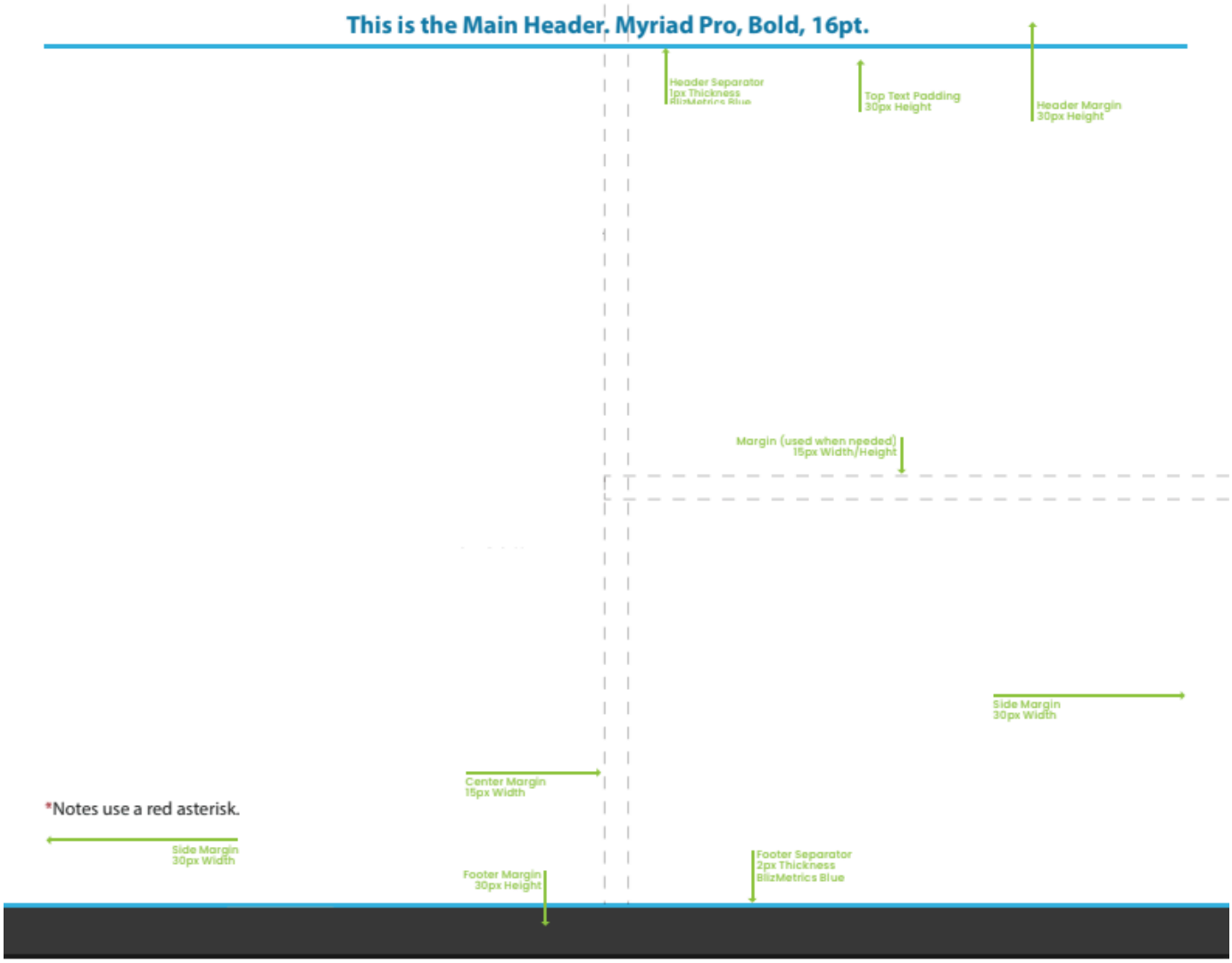


3. Once you get the HEX codes of the colors, you can then proceed with skinning the slide deck.
4. Click on the color bars on the side of the slide deck. Go to "Fill Color". Go to custom by clicking on the plus (+) button and change the HEX code based on the client's brand colors. Do this for the rest of the slides.



5. Add the logo of the client to the first slide and the rest of the slides.
6. Adjust the logo's transparency by clicking on the logo image, format options and adjustments. From there, adjust the logos' transparency to at least 50 to 70% so the color won't overpower any text.

Typography and Margins



We use the font 'Myriad Pro' as our main Typeface
The typeface goes well with our BlitzMetrics logotype font. We need to minimize the number of fonts used in our guides. *Less font variation = more consistency / more professional look*.

This is a Sub-header, the font used is 'Myriad Pro, 14pt font size. 14pt Leading
This is the main content text. The font used is 'Myriad Pro', 12pt font size.The leading is 14pt. Sometimes we use an italic version, for example, ***"Quotes such as this one, which uses Myriad Pro Italic, 12pt, bold. Using italicized styles make the sentence seem more important."***

We always use left-aligned text. We also set the Kerning to be Optical and make sure that

we don’t or at least, lessen breaking words midword.

Here’s an example of how we add lists to our guides

1. Make sure listed items end with a period.
2. When dealing with a paragraph as the list item, make sure that the text is indented to be after the number.
    A. Sub-lists use letters.
        I. Further sub-lists use Roman numerals.
3. When listing items that are in no particular order, we use a dot, Alt+7.
    - Like this.
    - And this.
    - And this.

When creating a hyperlink, make sure we use the Blitzmetrics link style

Let’s use the link to the Design Style Guide folder in the Team Drive as an example. You can click on the link ***here***.

The Cover Page

The cover page and first impressions.

The cover page is the first thing the client or customer sees, having a professional looking cover creates a good first impression and further legitimizes everything within the guide even before they flip the pages.



The background photo should be a ***high authorithy*** photograph of the Figurehead and should not look to busy and distracting.

The background must have contrast with the text in the foreground.

This is the guide's title. The colors should be contrasted enough to be readable even with a background image behind it. The text should not cover the subject's face.

The font used is Myriad Pro, Bold Condensed.

The total vertical length of these items should be aligned to the center.

Some guides have a tagline below the title. The font is ***Myriad Pro, Semibold, 12pt***.

Add the guide's badge to the cover page.

Use a high-quality head shot of the figurhead for the cover.

Dennis is the default figurehead for all guides. Only change this when the guide is handed over to a new figurehead/owner.

This tag shows the title of the guide and it's number in our 18 Modules. This will be further discussed in the ***Pages Template*** page on this guide.

Show the figurehead's name (***Myriad Pro, Semibold, 21pt***) with their title (***Myriad Pro, Semibold, 16pt***) below it.

This shows the file version. This should always be updated according to the guide's current version.

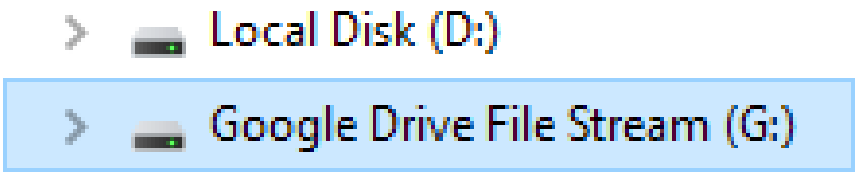
Google File Stream and the Blitz Graphics folder

What is Google File Stream?

It is a free service from Google which allows you to access files in your Drive from your computer, freeing up space in your disk drive and network bandwidth. Because Drive files are stored in the cloud, any changes you or your collaborators make are automatically updated everywhere.

You can also make Drive files available for offline access. These cached files sync back to the cloud when you're online, so the latest version is available on all your devices.

Download Google File Stream here.



*You can view files from your computer as if it was stored in a physical drive locally.

The Blitz Graphics folder

We have our images in a single folder called the Blitz Graphics folder. We have it all in one place so we don't have any problems finding files and removing duplicates.

NO. DUPLICATE. FILES.

A significant amount of images that we have are reused throughout our guides, that's why we only have one version for each file that we use often. This eliminates duplicates and different versions of an image in our guides. When you're going to work on an image, make sure there isn't an existing one beforehand

.

For example: Image A is used and linked to both Guide B and Guide C.
When we edit Image A, it is automatically updated in both Guide B and Guide C.

Vector images and why they matter

Vector graphics are used throughout our guides. A vector graphic is made up of points, lines, and curves that are based upon mathematical equations, rather than solid colored square pixels.

We only use vector graphics for our guides, we want to preserve quality in the images because we export guides as PDFs. This way, when people zoom-in to the PDF, they will never encounter pixelation with the exemption of raster images like photos.

Also, when we use photos, we use a large resolution to reduce pixelation.

The Master Guide, Master Presentation, and Checklist Architecture

The Master Guide

As the name implies, this guide is the ‘master’ file from which all guides are compiled. The Master Guide must always contain the most recent version of our guides.

The Master Presentation

The Master Presentation is a direct counterpart of the Master Guide. It is a presentation version of the Master Guide. Every guide we have has a presentation version which is compiled in this guide.

The Checklist Architecture

The Checklist Architecture is a compilation of checklists found throughout all guides. Slides in this file are compiled in the Master Guide. The Checklist Architecture has a presentation version which is compiled in the Master Presentation.

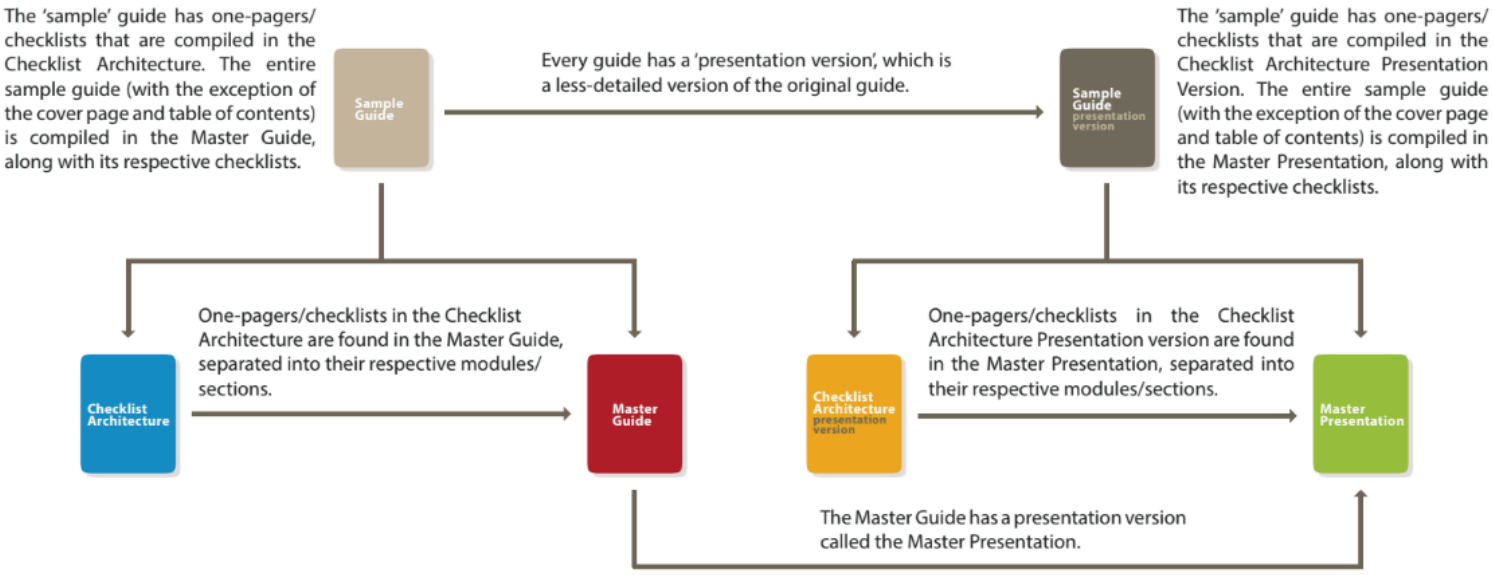
What is a presentation version?

As the name implies, presentation versions are used in slides for keynote speeches and presentations. The slides should be less-detailed but must remain understandable enough with one glance. It should not be saturated with text.

Summary

- Guides contain one-pagers/checklists.
- One-pagers/checklists are compiled in the Checklist Architecture.
- Guides are compiled in the Master Guide.
- Guides, the Master Guide, and the Checklist Architecture have presentation versions.

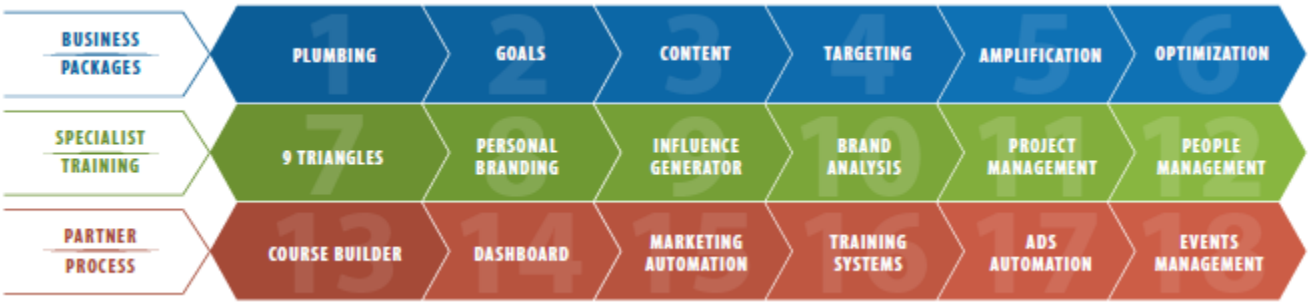
Diagram:


The 'sample' guide has one-pagers/ checklists that are compiled in the Checklist Architecture. The entire sample guide (with the exception of the cover page and table of contents) is compiled in the Master Guide, along with its respective checklists.
Sample Guide
Every guide has a 'presentation version', which is a less-detailed version of the original guide.
Sample Guide presentation version
The 'sample' guide has one-pagers/ checklists that are compiled in the Checklist Architecture Presentation Version. The entire sample guide (with the exception of the cover page and table of contents) is compiled in the Master Presentation, along with its respective checklists.
Checklist Architecture
One-pagers/checklists in the Checklist Architecture are found in the Master Guide, separated into their respective modules/ sections.
Master Guide
Checklist Architecture presentation version
One-pagers/checklists in the Checklist Architecture Presentation version are found in the Master Presentation, separated into their respective modules/sections.
Master Presentation
The Master Guide has a presentation version called the Master Presentation.

Master Page templates and Section Prefixes

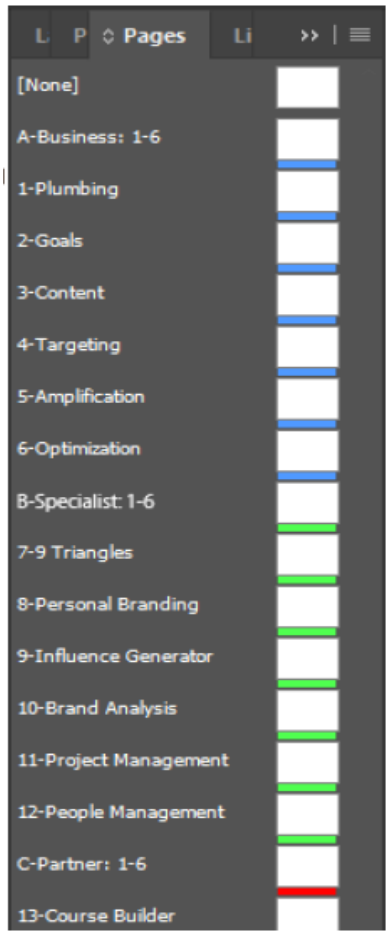
A template for every guide.

We have a template for every guide we have that is based off of our 18 Modules, seen below.



The first module in the diagram is the Plumbing module. In our templates in the Pages tab, it is found as **1-Plumbing**.

Important: Every guide should be using its respective template. This not only reduces errors in the future, but also helps in tracking.



Overview guides.
If you notice, there are templates called A-Business: 1-6, B-Specialist: 1-6, and C-Partner: 1-6. These represent the 3 guides that are overviews of the 6 guides within themselves.

The 3 overview guides are:
Social Amplification Engine. It is an overview from Plumbing to Optimization.

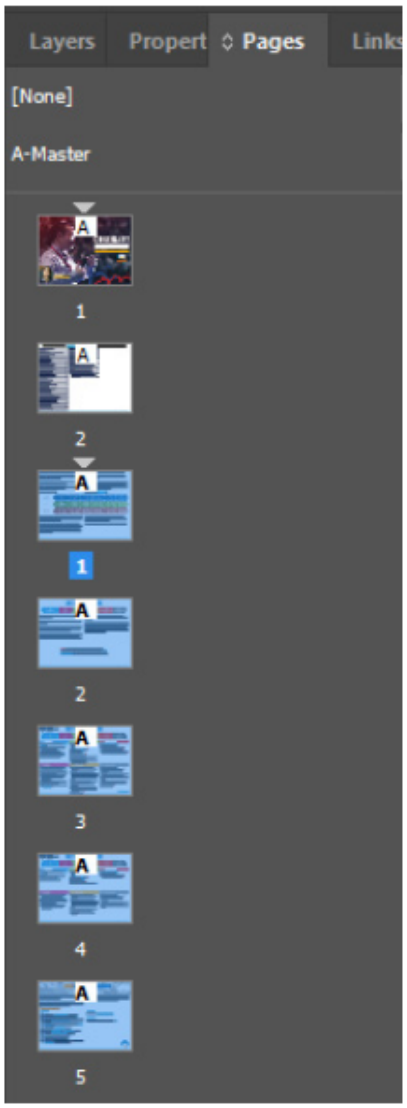
Digital Marketing Training System. It is an overview from 9 Triangles to People Management.

The **Partner** overview guide is yet unfinished but will be labeled according to our template. It is an overview from Course Builder to Events Management.

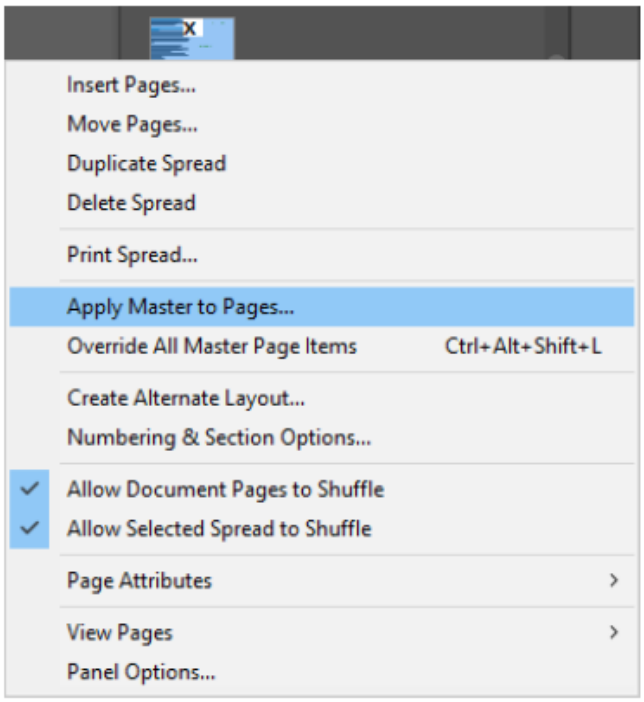
How to apply our templates to pages

Here's how to make your job easier.
If you're working on a new guide or updating an old one which doesn't use our template, these steps will help you migrate into a much easier and efficient workflow.

How to apply our templates to pages.
Step 1: Select the pages from the Pages tab which you want to apply the template. See below.



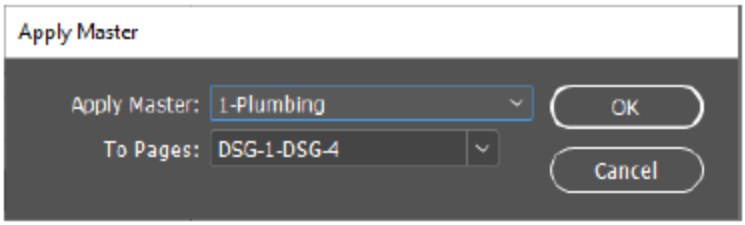
Step 2: Right-click on your selected pages and select **Apply Master to Pages**. See below.



Step 3: On the **Apply Master**: dropdown menu, select which template you would like to apply to the pages. See below.

On the **To Pages**: menu, you can see which pages are going to be affected by your changes.

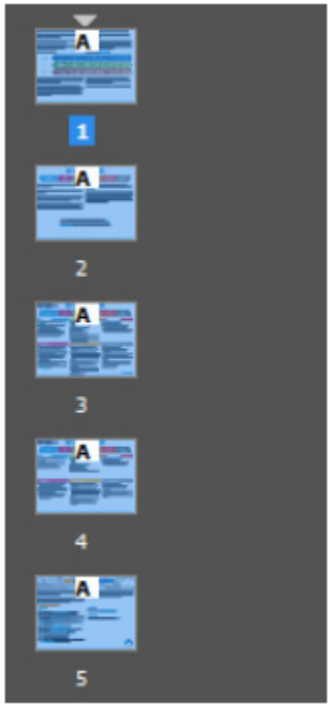
Click **OK** and you're done applying the template.


Apply Master
Apply Master:
1-Plumbing
To Pages:
DSG-1-DSG-4
OK
Cancel

Prefixes and page numbering

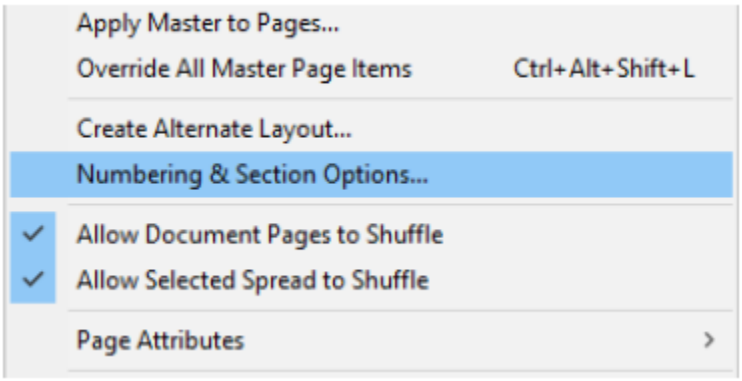
Let's label our pages.
Like in the last tutorial, if you're working on a new guide or updating an old one which doesn't use our template, these steps will help you label the pages correctly. This will help you, as a designer working with InDesign to track your pages.

How to label your pages.
Step 1: Select the pages from the Pages tab which you want to label. See right.



Important: Do not include the Table of Contents pages when selecting pages to edit.

Step 2: Right-click on your selected pages and select Numbering & Section Options. See below.



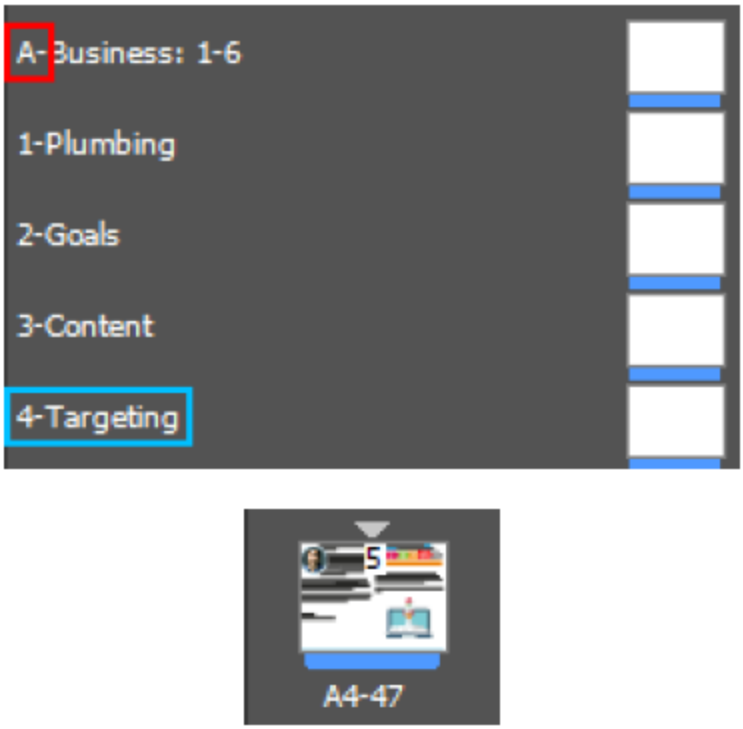
Important: Do not select the Start Page Numbering at: option if you are not working on the Master Presentation, Master Guide or Checklist Architecture.

The reason being that if you are working on the guides mentioned, and the pages you are editing are in the middle, clicking on the said option will create another page 1. This in turn will mess up the succeeding page numbers in the footer and the Table of Contents.

Step 3: To understand our numbering convention, we will use Targeting, the fourth module in our 18 Modules as an example. See below.

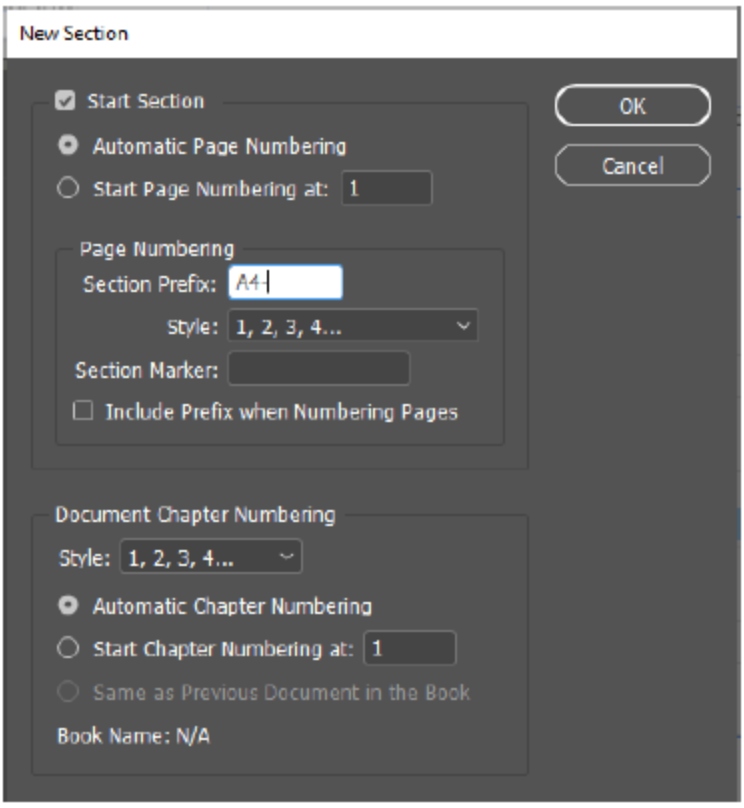
A is the section in which the pages you selected are a part of. A being the Business Packages.

4 is the number in the 18 Modules that the pages are a part of. Since Targeting is the fourth module, we use 4.



Step 4: Therefore we write **A4-** (the - is used as a spacer between the prefix and the actual page number) on the Section Prefix.

Select **Automatic Page Numbering** and click **OK.** Congratulations, you just eliminated headaches from trying to find your slides in the Master Presentation and similar guides.


New Section
Start Section
Automatic Page Numbering
Start Page Numbering at: 1
Page Numbering
Section Prefix: A4-
Style: 1, 2, 3, 4...
Section Marker:
Include Prefix when Numbering Pages
Document Chapter Numbering
Style: 1, 2, 3, 4...
Automatic Chapter Numbering
Start Chapter Numbering at: 1
Same as Previous Document in the Book
Book Name: N/A
OK
Cancel

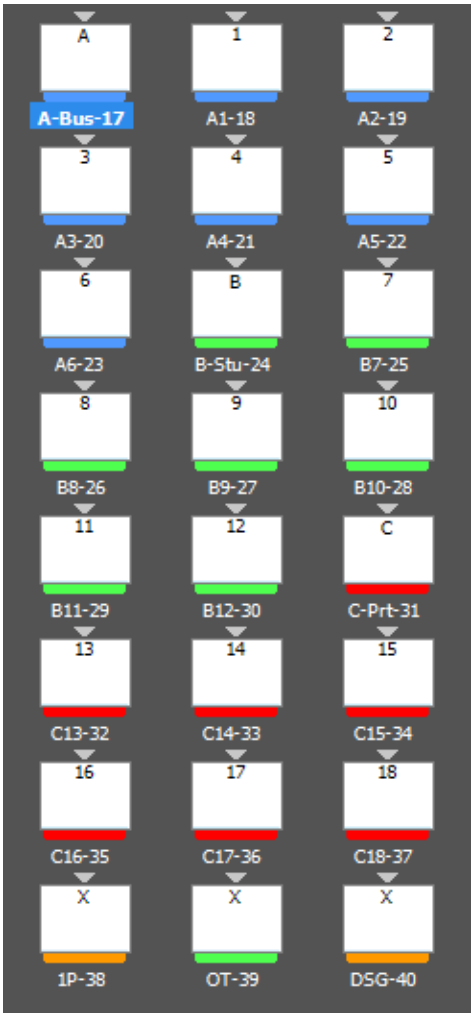
Page numbering codes

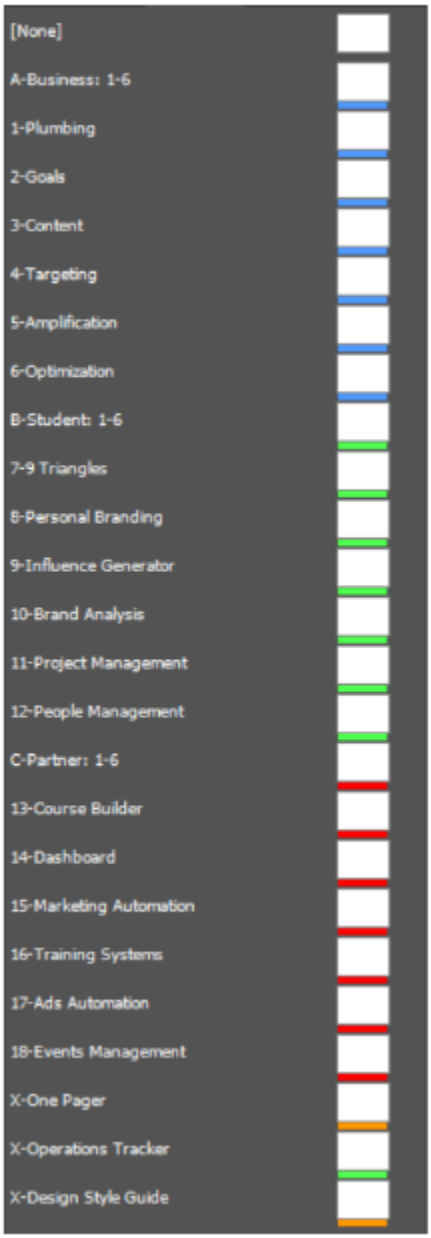
Here's how to make your job easier.
Using page codes in your InDesign file will help you in tracking your files, especially when you're adding them to the Master Presentation, Master Guide, and Checklist Architecture which have a lot of pages.

Here are the codes for the page numbering.

Page Code	Master Template	Course Name
A-Bus-	A-Business: 1-6	Social Amplification Engine
A1-	1-Plumbing	Digital Plumbing
A2-	2-Goals	Goals Analytics Checklist
A3-	3-Content	Content Marketing
A4-	4-Targeting	Dollar A Day
A5-	5-Amplification	Amplification Checklist
A6-	6-Optimization	Optimization Guide
B-Stu-	B-Student: 1-6	Digital Marketing Training System
B7-	7-9 Triangles	Business Framework Triangles
B8-	8-Personal Branding	Personal Branding
B9-	9-Influence Generator	Influence Generator
B10-	10-Brand Analysis	Brand Analysis
B11-	11-Project Management	Success Tracker/Asset Tracker
B12-	12-People Management	Meetings Checklist
C-Prt-	C-Partner: 1-6	N/A
C13-	13-Course Builder	Course Builder
C14-	14-Dashboard	Dashboards
C15-	15-Marketing Automation	N/A
C16-	16-Training Systems	N/A
C17-	17-Ads Automation	N/A
C18-	18-Events Management	Events Checklist
1P-	X-One Pager	N/A
OT-	X-Operations Tracker	Operations Tracker
DSG-	X-Design Style Guide	Design Style Guide

The example below shows the **Page Codes** applied to pages. *Ignore the right- most numbers, those just show the actual page numbers that InDesign adds to our template.*





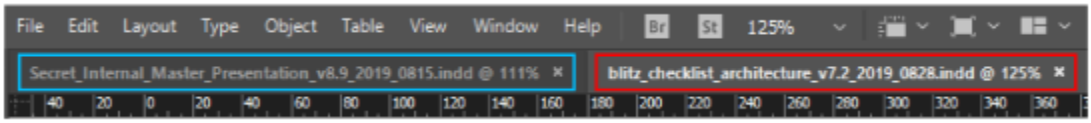
The screenshot below shows the **Master Templates** that we have ready to be applied to your old guides.

How to transfer INDD pages to another file

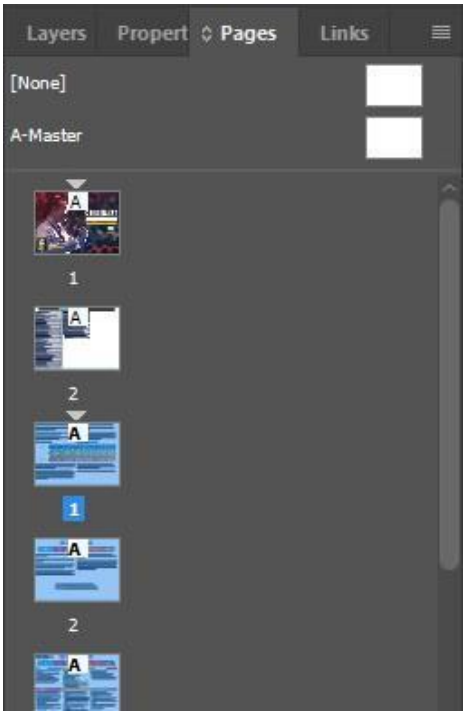
Why do we transfer INDD pages to another INDD file?
Transferring pages from one INDD to another file preserves the editing capabilities of the objects in that page. When you edit the original file (where you're transferring from) it also updates the objects in the new file. This is much more efficient than copying and pasting one page at a time.

How to transfer INDD pages to another file.

Step 1: Open your two files in InDesign, one file where you're going to be moving pages from and one where you're going to be moving the pages to. In this example we'll be moving pages from the Checklist Architecture to the Master Presentation. Select the Checklist Architecture file.

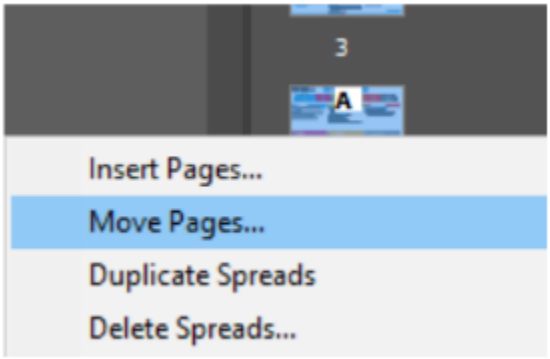


Step 2: Click on the **Pages** panel in the upper-right corner of the artboard and select the pages you want to transfer.

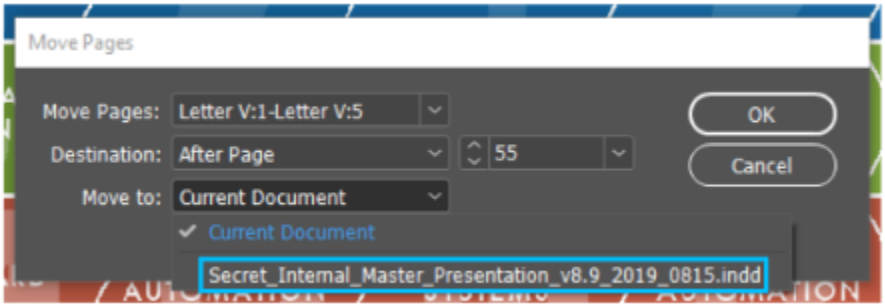


Important: Never import PDF pages to the INDD file.
Importing PDF pages into an INDD file removes all interactive objects from the file. Think of it as importing a JPG image into a PDF, there would be no clickable links, no tickable checkboxes, and no video.

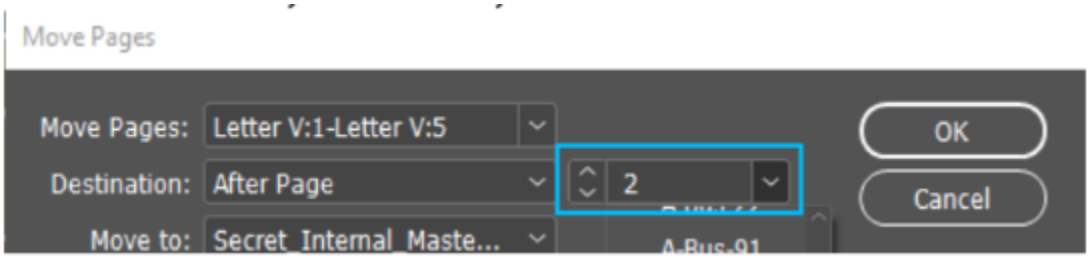
Step 3: With the pages selected, right-click on the pages panel. Click on **Move Page**



Step 4: Click on the **Move to:** dropdown menu and select the file you're going to move pages to. In this case, it's the Master Presentation.



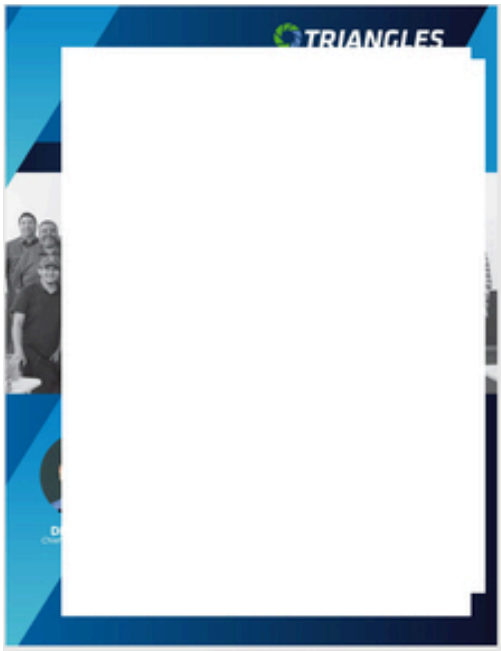
Step 5: Choose your destination (where you want to insert the pages) and Click **OK**. Save your files and you're done.



How To Partially Export A Google Document To A PDF

1. Press "Ctrl + P", then it will prompt to print the document.
2. Input the following:
    - Destination: Save as PDF.
    - Pages: Custom, then input the pages. For this example, it's 1-30 (excluding page 31, Pending Process Update).
3. Hit Save.

There is a glitch with a Google Document when a user exports the file. The PDF shows a white space on the top of the cover. This happens when a suggestion comment or an addition using “Suggesting Mode” is on the first page. Simply move the suggestion to the next page or ask for a process developer, or an operations specialist to resolve the comment. Do not resolve it yourself.



Exported PDF



The Cover on the Master Specialist Guide Document

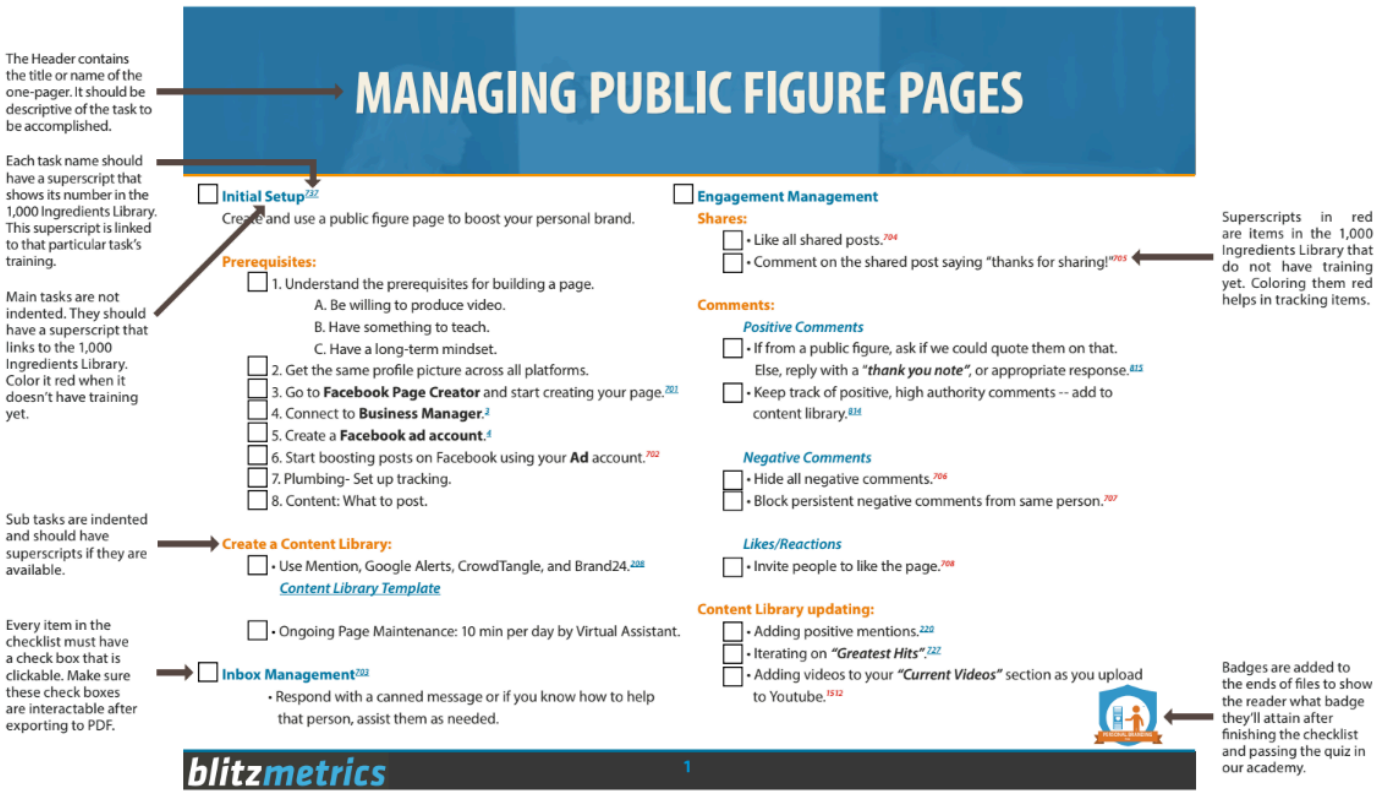
Creating One-pagers

What are One-pagers?

One-pagers contain a checklist of the steps that need to be taken to complete a task. It can be printed out so people can check off items as they complete the steps. *All one-pagers and checklists are compiled in the Checklist Architecture.*

Items in the checklist should be concise and easy to understand with no room to be misunderstood. We used the Managing Public Figure Pages one-pager as an example as a template to help you understand what a one-pager should look like. We have the example below.

Download the One-pager Template here.



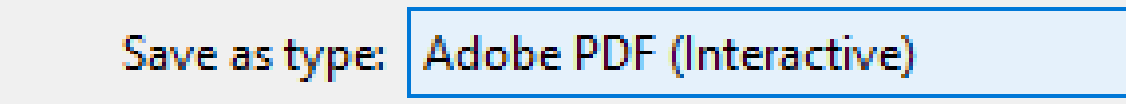
Interactive files and Basecamp

Why do we use interactive files?

Every guide or one-pager we create is handed out to clients and customers. We give them the option to learn and do the training themselves, that is why we leave them links, check boxes, videos, etc. to help them out. Interactive files do just that.

Think of it this way, when you see a hyperlink in your standard - every day book, it would be impossible (obviously) to click on it. You would have to type the URL into your browser, and that is incredibly time consuming. Having a PDF eBook on the other hand, allows you to click on that link.

Important: Always save your files as *Adobe PDF (Interactive)* when you export your INDD file to PDF.

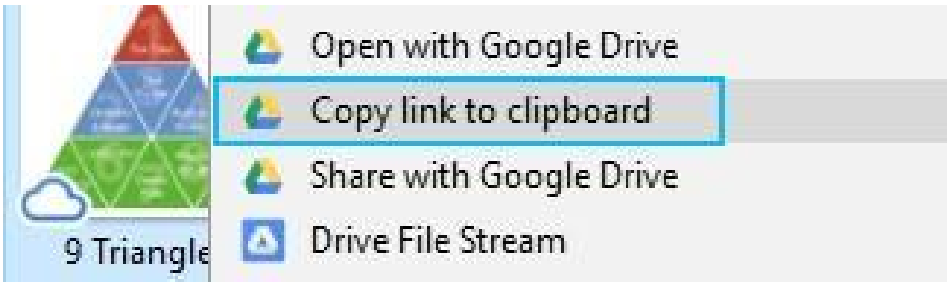


Basecamp is where we live.

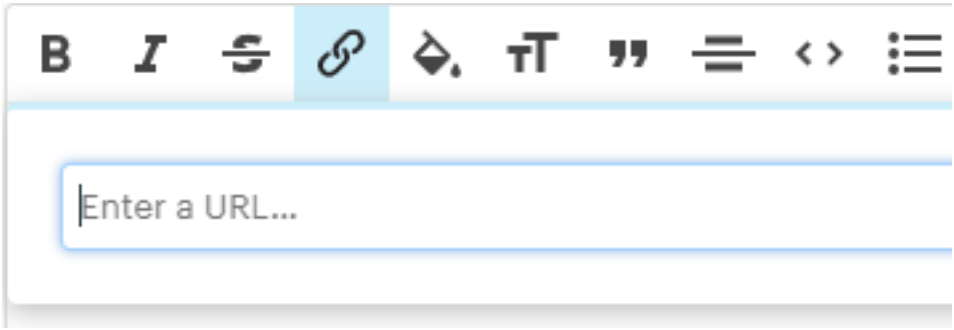
We use ***Basecamp*** to communicate with the team and track tasks. Updates on the threads should be often and detailed.

Basecamp is a great tool for communication, but not very good for storing files. It only allows for a few gigabytes of total storage of uploaded files, when we used up our allowed storage, we would have to delete older files that were uploaded. This is a very tedious task to do since we update threads very often. A very good alternative is to use Google File Stream instead.

We copy the link from our team drive (from your computer), then right- click on the file we want to add to Basecamp, then click on **Copy link to Clipboard**. You can now add that URL to the thread without using up storage space in Basecamp.



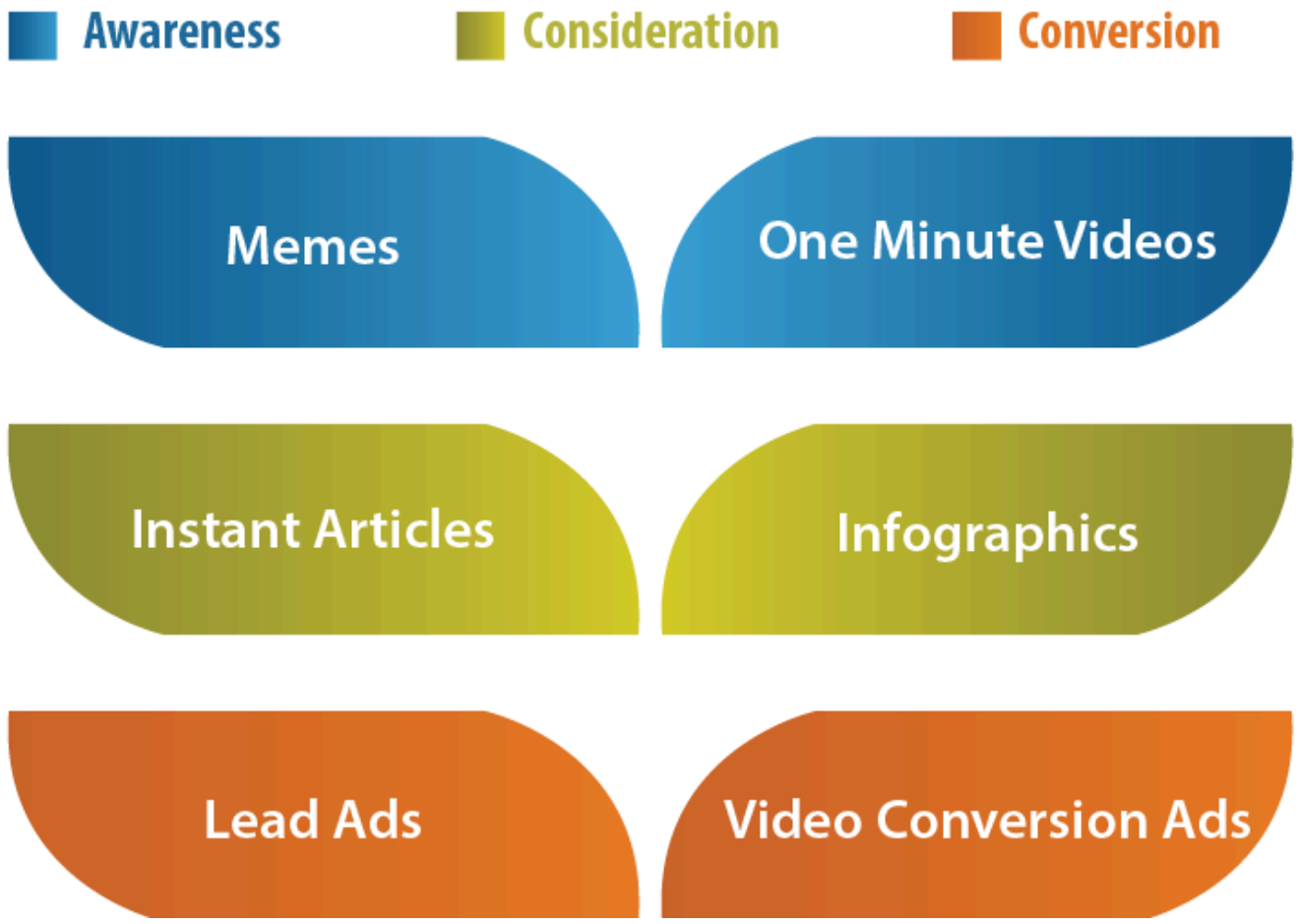
In Basecamp, you can paste your copied link to the comment you're adding.



6 Types of Visual Content

We design 6 types of visual content.

We design for Memes, One Minute Videos, Instant Articles, Infographics, Lead Ads, and Conversion Videos. Check this ***link*** to see the details for each type in order to gain an understanding on how we should be designing for each of them.



Course Creation Process

1. Create a Basecamp Project for each full-blown course.
2. Create a list of lessons and topics.
3. Film or collect course videos.
4. Edit the videos (Upload to Wistia)
5. Transcribe Videos (If you use FancyHands, follow the correct process)
6. Create a guide from the transcription of the videos.
7. Load the videos (Wistia Videos, not YouTube) and course content into the Academy. This includes a quiz and badge upon completion.
8. Build a landing page (Who it's for (and not for), Why it's valuable, Process after purchasing). Include the guide download upon purchase.
9. Make a product and order form in IFS. (Do not do this if you have not taken the Infusionsoft Basics Course).
10. Make course tags in Infusionsoft and add to the Academy. (Level 4+ only).
11. Post from public figure page.
12. Boost and promote the course to drive awareness.
13. Create a fulfillment campaign in Infusionsoft.

Course Creation Checklist One-Pager



- ☐ This course has an introduction and a title.
- ☐ It has a one-pager (checklist/cheat-sheet).
- ☐ It has a cover photo.
- ☐ It has the current guide available after purchase.
- ☐ The course has a quiz (MICRO courses should have 10 questions and standard courses should have 20 questions).
- ☐ It has a badge loaded with the correct requirements.
- ☐ It has a landing page with a CTA checkout button that links to the shopping cart/order form.
- ☐ It has lessons/topics that contain edited videos with no RAW mistakes and are embedded through Wista.
- ☐ The course is set up with Dynamic Conversion tracking.
- ☐ It has associated auto-enroll tags associated with Infusionsoft.
- ☐ There is no content with previous specialists/VA's who are not with us anymore.
- ☐ Has active fulfillment campaign in Infusionsoft.

AFTER PUBLISHING

- ☐ The course has been promoted on Social Media for $1/day for 14 days.
- ☐ The course is in our Course Catalog, Asset Tracker, Project Tracker tabs (we want all of these in one document)
- ☐ Update the Course Tracker in the Asset Tracker to document and track all course assets.

Components of a Course

Introduction with Title

1. This course has an introduction with expectations of the courseware and a title.
2. “Why <guide topic>”. You need people to understand why Personal Branding or the topic is important.
3. The strategy behind the checklist. How it fits with the other checklists (no checklist stands alone, since they’re all linked together).
4. A few sentences from the guide owner (whoever is “adopting” this guide as the resident expert/ curator/ figurehead).

One Pager (Cheat Sheet)

1. The checklist boiled down to just one page with checklists items that have check boxes.
2. Summarize the content to a single page of 5 primary items. Each item will have one or more steps.
3. Show overall time summary as well as section times: how much time for a trained analyst to complete the checklist once.
4. Show a single number for *Training Time,* which is the number of hours to learn the strategic concepts and tactical knowledge necessary to be able to implement (not the implementation time).

Full Checklist with Steps (optional)

1. If the listing takes 3-4 pages to list out the 5 primary checklist items and step-level detail, then include this section.
2. Show time at the step level, aggregated to the item level and then overall checklist level.
3. Ask the checklist owner to supply what is missing.

Structure Your Course with Video Topics

1. One pager showing the *Introductory Video* (a live video which should be on the landing page for this checklist, and optional accompanying videos (some made by us and most to be made by LDS Business College team).
2. Three categories of videos:
    - Live video is a person talking in front of a camera (used for the introductory video).
    - How-To screenshare is a Go-To-Meeting desktop recording in our YouTube channel showing click-by-click how to do something.
    - Expert Interview is a partner explaining one of the key concepts.

5 Types of Content

As we are tagging content with various tags for level, topic, related task, and so forth-- make sure to have a column (not a tag on what level access the content is for:

- **Public** -- anyone can see it, like on a public figure page or blog.
- **Gated (free)** -- they must be logged in to our system.
- **Gated (course specific)** -- they must be customers of that course.
- **Gated (BlitzNation)** -- anyone with a current, valid membership.
- **Internal** -- BlitzMetrics team members only.

Work-in-progress content is internal, by definition, since it's not ready for publishing. As we are tagging content with various tags for level, topic, related task, and so forth.

Google Doc versions of our checklist guides are **INTERNAL GUIDES** in finer detail so that **internal resources can execute these steps**.

The differences with the internal guides (besides living in Google Docs instead of in these PDFs) is that internal users (our team members):

Have access to specific systems that we've integrated to help us speed up the work-- increasingly so, because we are trying to automate the whole thing. Of course, businesses who buy a $7 guide don't get access to these, except the dashboard for metrics.

Task verification and QA-- of course, we don't provide human support to non-clients. And given that they're not working for us, they don't have to agree to or abide by our standards. But we can provide automated follow-up in Infusionsoft and the dashboard to nudge non- clients along for the DIY path.

Payment and job progression-- to get paid per hour/task based on level, as in our leveling system. This is the analyst track-- running parallel to the business track-- not what a busy business owner would want to understand nor spend sufficient time to do themselves.

So it's okay to have PURCHASABLE GUIDES and INTERNAL GUIDES, so long as we understand that the former has step-by-step instructions to accomplish the tasks via systems they have access to without support from us. The internal guides should be built from the purchasable guides-- not the other way around.

DESIGN TEMPLATES



DESIGN TEMPLATES
Still images for promoting webinars, events, promos and interviews

Cover Page Canva Template
https://www.canva.com/design/DAFviY6d44Y/5cA33PHvlcwOfMrSiLfeFg/edit?utm_content=DAFviY6d44Y&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton

Module/Phase Canva Template
https://www.canva.com/design/DAFtRFVVXWE/wUPlT8n0l0UKHaflVDNluA/edit?utm_content=DAFtRFVVXWE&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton

Advanced template for co-branded Fiverr and Blitzmetrics
https://drive.google.com/open?id=19NnHBiR_-eeTsF4vvkpi3vSrcop_HeSF

V1.1 on blitz PBM template... added page numbers then fixed some of the pages for easier editing.
https://drive.google.com/drive/folders/1Jf59BhsTCORgr_uC89w5FCmq9sxNvM9b?usp=sharing

Video on editing the Indesign file
https://www.loom.com/share/d420006085084fb0ab439619923187ee Basic template here
https://drive.google.com/drive/folders/1qyRdo7095xAiEbV-bYutslS4XDgay9QV?usp=sharing

Video on editing the Indesign file

https://www.loom.com/share/d420006085084fb0ab439619923187ee

UNDERSTANDING THE WHOLE COURSE BUILDING PROCESS

Designers should study both



1. The course-building process for the course-builders (reader of the ***Course Builder Course***) and the

2. The design process for the designers within the Design Guide.

That seems to be more sensible since the chapters that are relevant for a designer within the Course Builder Course are spread out rather than compiled in one chapter.

In fact, even if these reasons are invalid, we still have to update the design guide eventually for the Marketplace anyway



SKINNING GUIDE

Made for those who have background in InDesign

Welcome to Nine Triangles. I am Jess, the manager of the design team. This guide will help you in skinning, not just any particular guide in BlitzMetrics, but everything needed to jumpstart your agency or company.

To give you a background on what we are currently doing: We have 60-70 plus guides that we are presently maintaining. Most of them average into 100-200 plus pages. We also categorized our design into three parts: Guide, Book, and Presentation version.

We usually provide the Indesign files for major guides made. However, for skinned versions, we just do the fast and non-traditional way of doing it.

Skinned guides usually are the easiest thing to do; we just replace the cover, add pictures, redo the paging, add a logo, and lastly, the conclusion page.

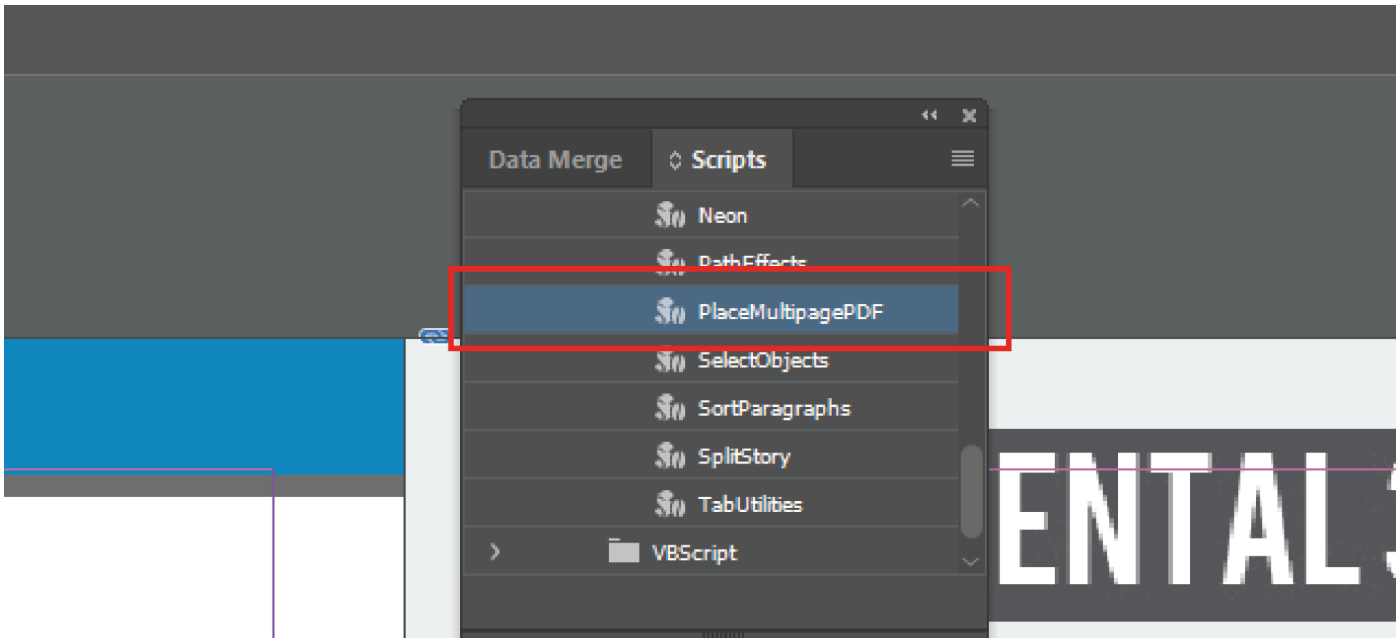
So let's get started.



Opening PDF Using Multi-Pages Script

If we don't have an InDesign file for a particular guide, we don't have to worry as long as we have the PDF. All we need to do is open up in Indesign. Then **Locate the Window tab > Utilities > Scripts**

Then locate the "PlaceMultipagePDF" locate the PDF that you want to open. You can open it in a "new document" or add it to a previous indesign file that you already opened. Click Okay.



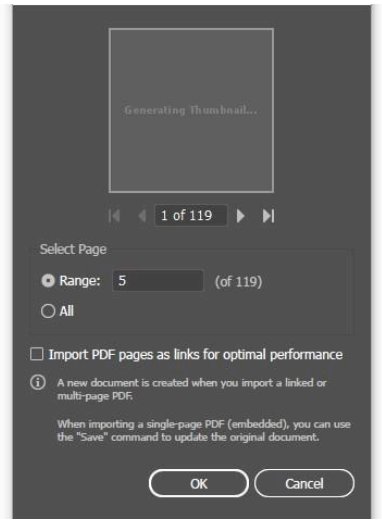
Editing the PDF

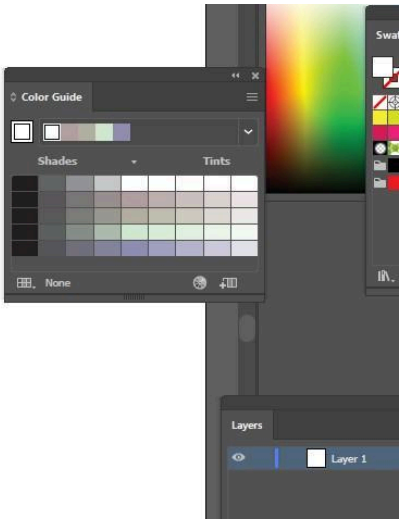
After doing the script, you now have a working PDF in the Indesign file, which you can add, edit, and iterate.

In editing the PDF, you need to edit this using Adobe Illustrator. For example, on page 5 of a specific guide, you need to change the sentence or add an illustration.

You go to the main PDF and click open within Adobe illustrator.
And input the page you want to edit in the range section (see screenshot below).
Once open you can now edit the page then after just click save. Then update the link in Indesign.

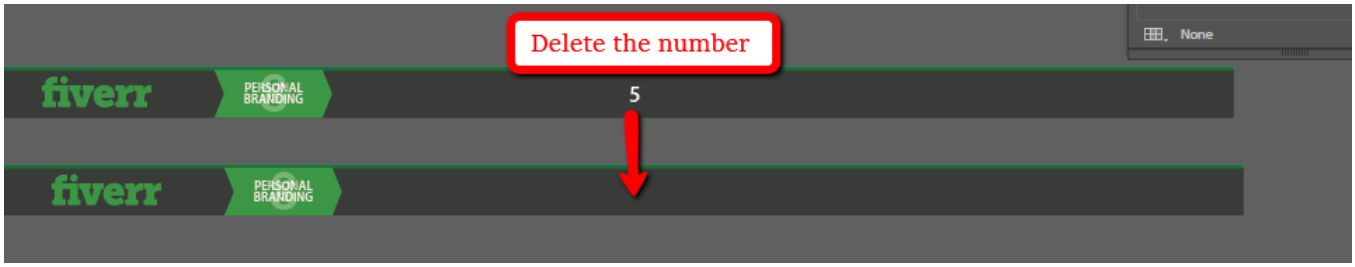




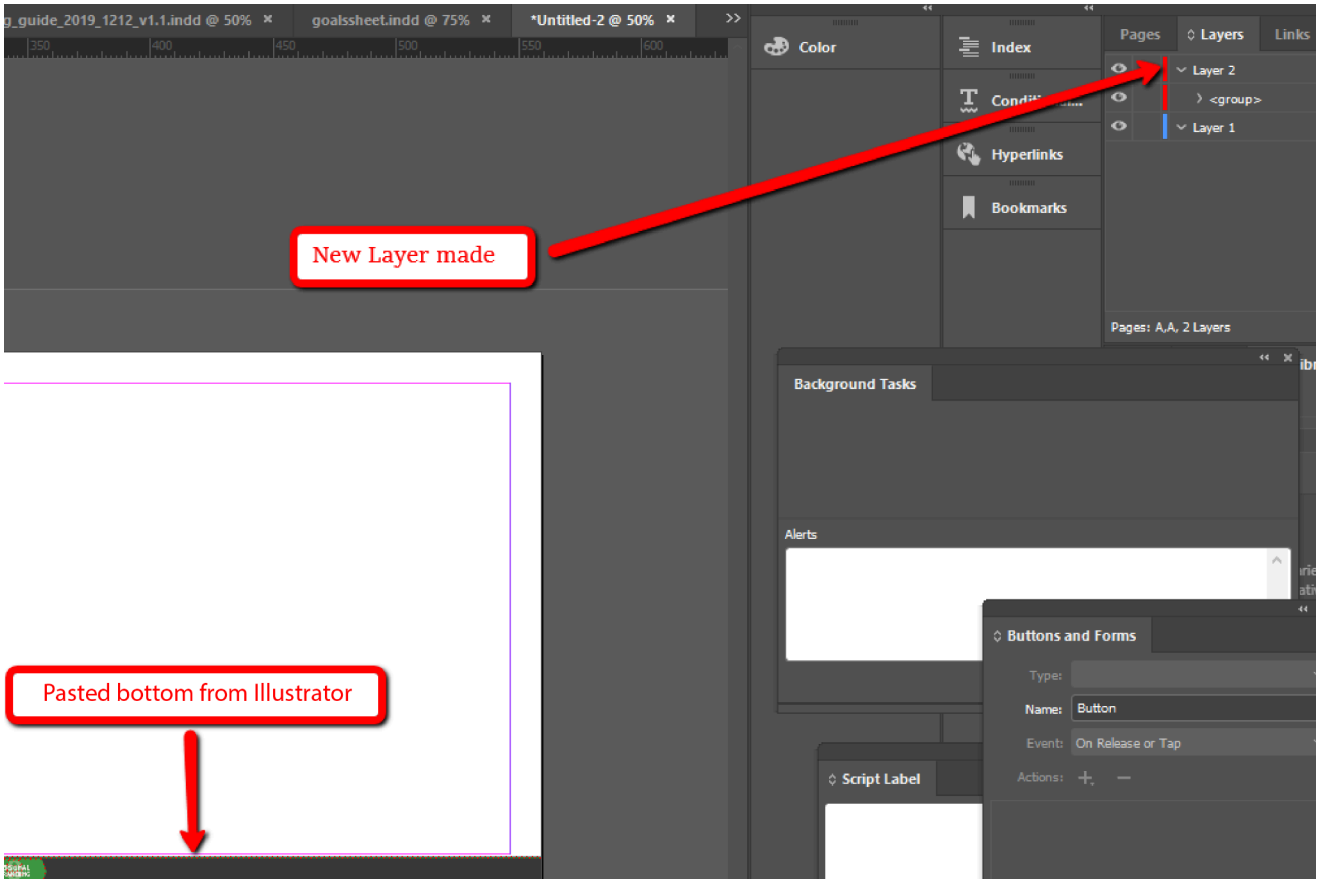


Pagination and Master Page

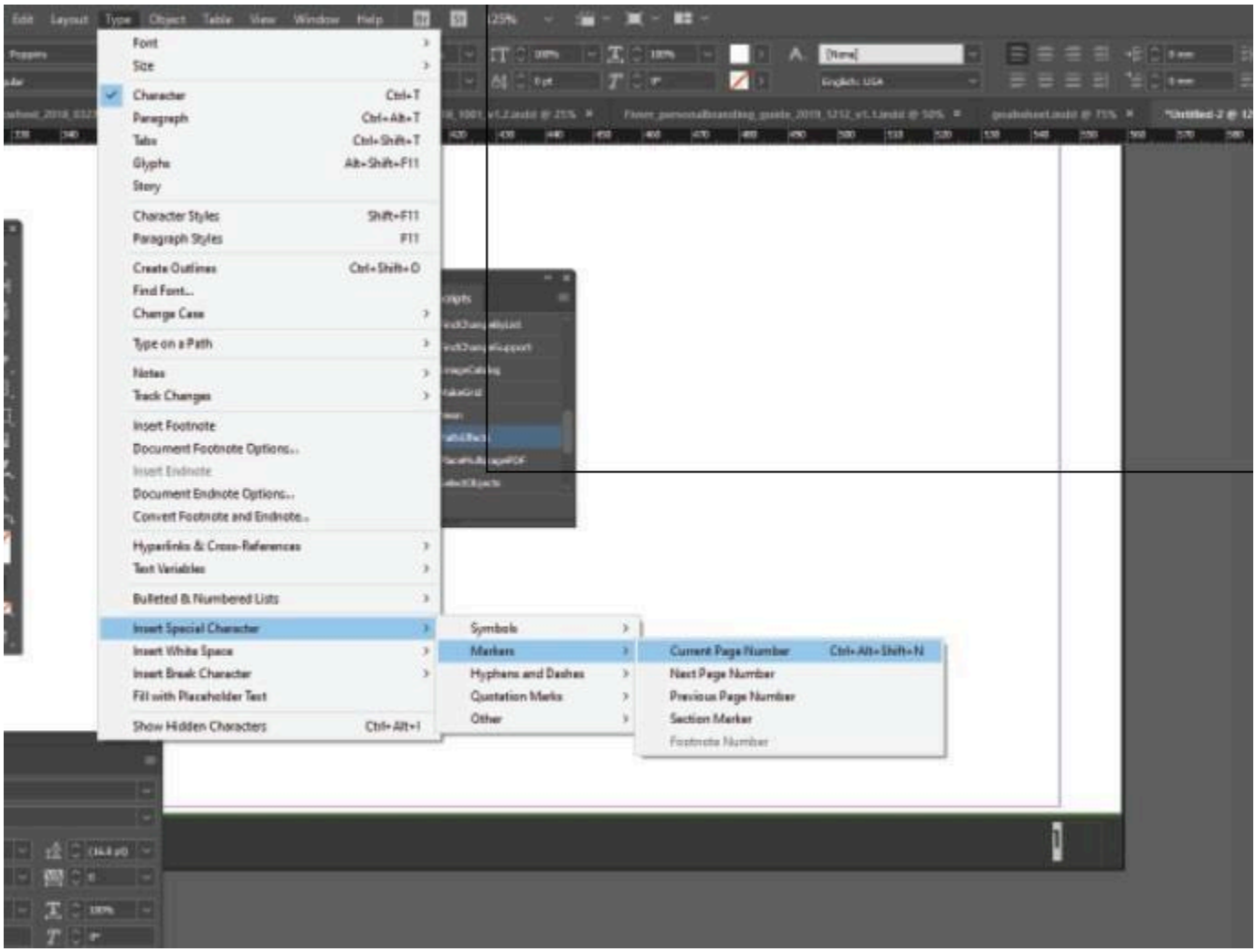
Pagination is the most tricky part of skinning a guide. Since most of the PDFs already have a permanent page in them. If you are that hardworking, you can edit each page and change numbers. However, it will take you hours to do if you are going to change a 200-page PDF. Usually, what I do is to replicate the bottom part of the guide using Adobe illustrator.



I then group the replicated part and copy. Then open my Indesign file. Locate the Master file. Make a new layer. Then paste. (see new page for screenshot)



You can then add a text. Type any number.
Then go to “type” > insert special character > Markers > Current page



HOW TO SKIN THE FIGUREHEAD PICTURES



How To Skin The Figurehead Pictures

If you are asked to skin a guide for a particular figurehead. We only need to gather the following:

- High-resolution picture
- High authority picture
- Adobe Photoshop

Step 1: Open the high resolution picture into your Adobe Photoshop



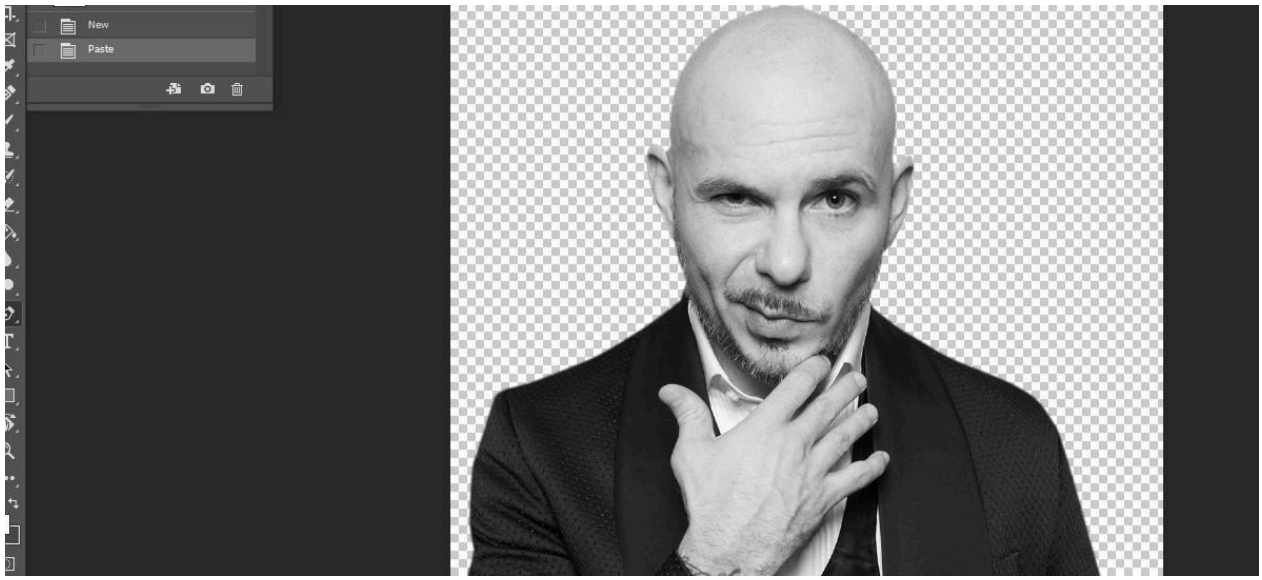
Step 2: Use the tracing tool



Step 3: trace the edges until you close it.



Step 4: Righ-click the “Make selection” Put Feather Radius as 1 then press okay. Step 5: Inverse selection by clicking “Ctrl-Shift-I”
Step 6: Cut the background by clicking “Ctrl-X” Step 7: File save as a PNG.
Step 8: You can now edit the cover guide with your new cut figurehead picture replacing Dennis.
Step 9: You can also make the high authority picture as your background image and fade it accordingly.



I think that is pretty much how we do our skinning the easiest and fastest way, although there are other challenges and designs needed to make it really different from the original.

This guide is particularly made for those people or designers who already have prior experience and knowledge in Indesign. So we don't have to go deep on basic things. I wish you best of luck and if you got any problems please do email me at ***Jess.beltran@blitzmetrics.com***



Standard Last Page Design

- Grab high authority picture to be your background on the page
- If the client doesn't have a vector logo or high definition PNG. You need to retrace it in Adobe illustra- tor to make it into a vectored logo which can be used anywhere in the guide.
- Have a "Thank You" message
- Have a high authority picture cutout for the client.
- Add a social media page button and email.




SAMPLE LAST PAGE DESIGN
BBB
Start With Trust
Thank You!
@getfound
dennis@blitzmetrics.com

TEST QUESTIONS

1. What are the main software use in skinning guides?

2. How do you open a multi-page pdf in Indesign?

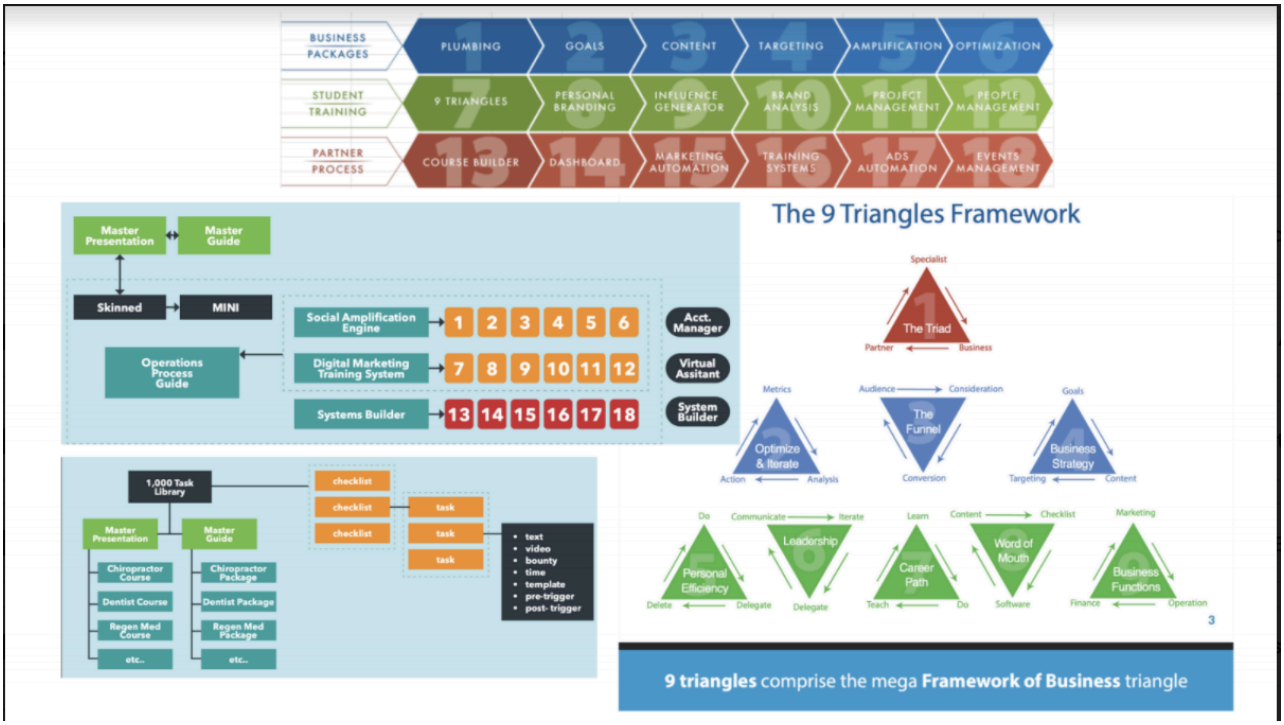
3. How do you fix the problem with page numbers?

4. In tracing a figure head what software do you use?

5. When you “make selection” what radius should you use when you feather?

Designer Skill Assessment

Task 1. Remake this exact image in Adobe InDesign. ReMAKE, not re-design.



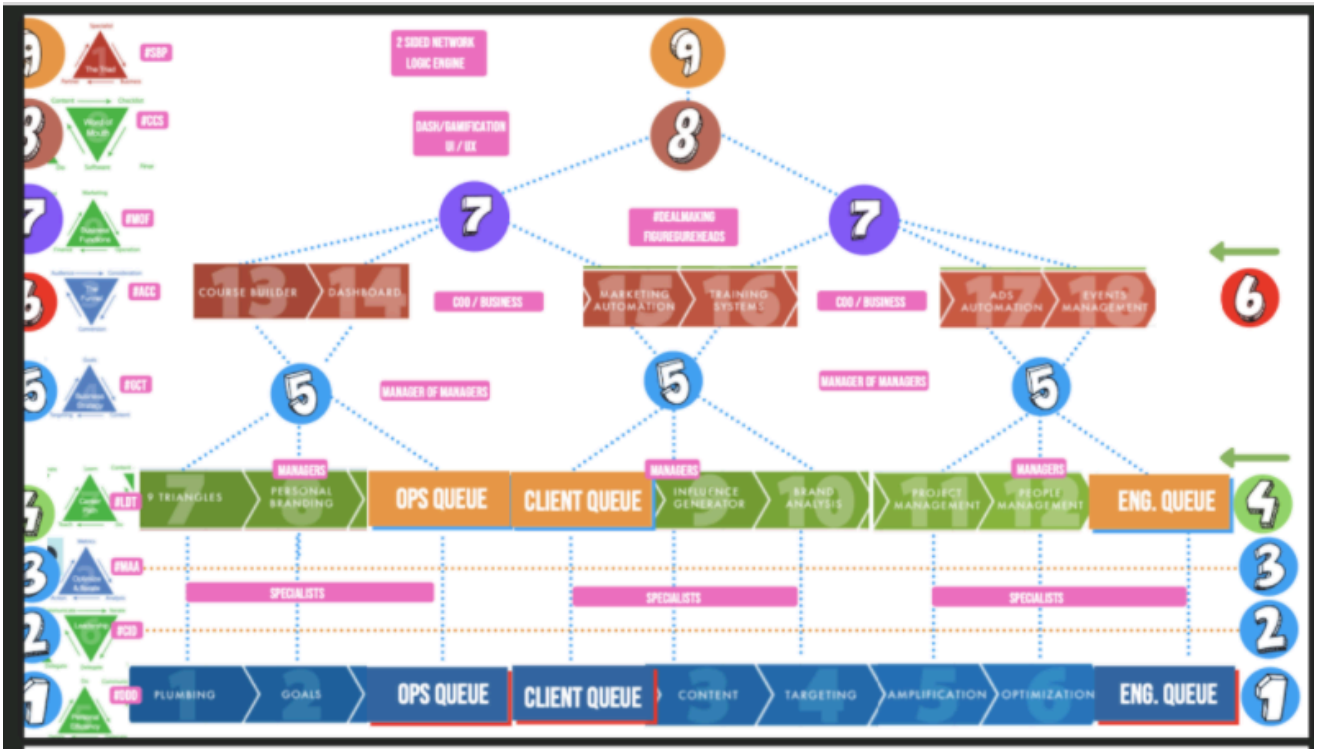
Project files:

[18_module_Diagram_9_Triangle chirorevenue_ops_training_diagram1_v1.2_2021_0120 explode]

Results:

1 PDF.
1 Adobe InDesign Project file.

Task 2.



1. Clean up this image into something more like our branded look—image in task 1.
2. Make everything symmetrical.
3. Change the numbers to all be the same color and fonts to the same fonts you're using.
4. Make the colors of the numbers with circles and the pink boxes white.

Project files:

18_module_Diagram_9_Triangle
chirorevenue_ops_training_diagram1_v1.2_2021_0120
explode

Results:

1 PDF.
1 Adobe InDesign Project file.

HOW TO PREPARE A PRESENTATION DECK

The more presentations you see me give, the more you'll notice that I tell a story, teach from that example, then extrapolate to the bigger picture. Then I repeat again, starting with another specific story.

Contrast that with showing just tips, which comes off as professorial, and you'll see why we tell stories to teach. In fact, it's why we are constantly teaching people how to do a WHY video (when I was, I believe that, I am)-- we are literally following this framework thousands of times.

Now that you know this, consider how to adjust these decks to fit the style I've used for years. Part of the reason I use this presentation style is to be able to speak when there aren't any slides or when the slides aren't usable. Of course, we prefer having usable slides instead of forcing me to open tabs to narrate (as you typically see me do hundreds of times in the last few years).

Note also that the presentation version is for me to present (I'm narrating, so we don't want lots of text) and we hand out a guide version (a "book" that people can read later at their leisure, not narrated verbally by me, but with text to read). The good news is that the guide versions are just re-skinned versions of what already exist. You'll see that what we want to present here is 95% the same as the base presentation I've been doing for years-- mainly just skinned and narrated differently.



At both the beginning and end of a presentation, we want to list the key points as bullets-- especially again at the end, so we can recap. Most attendees won't remember the particular tips, so they will feel lost without a "top 10" list. So be sure to not only do this here, but make sure we put it in our Course Builder Course, so others will know, too.

The more presentations you see me give, the more you'll notice that I tell a story, teach from that example, then extrapolate to the bigger picture. Then I repeat again, starting with another specific story.



Contrast that with showing just tips, which comes off as professorial, and you'll see why we tell stories to teach. In fact, it's why we are constantly teaching people how to do a WHY video (when I was, I believe that, I am)-- we are literally following this framework thousands of times.



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From Smart Traffic Presentation to Social Media Marketing World using the same deck

DECKNote also that the presentation version is for me presenting (I'm narrating, so we don't want lots of text) and we hand out a guide version (a "book" that people can read later at their leisure, not narrated verbally by me, but with text to read). The good news is that the guide versions are just re-skinned versions of what already exist. You'll see that what we want to present here is 95% the same as the base presentation I've been doing for years-- mainly just skinned and narrated differently.





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VIDEO THUMBNAILS

- Make sure the play button is centered perfectly within the thumbnail.
- Include the video title at the bottom-right of the thumbnail in bold.
- Include the run-length of the video after the title in standard font (not bold).

IMAGE DESCRIPTIONS

- In the case of replaced images or career changes, make sure the images descriptions are up to date and accurate.
- With very few exceptions to this, format all image descriptions like so:FirstName LastName (position in image), Title | Company

QUOTES

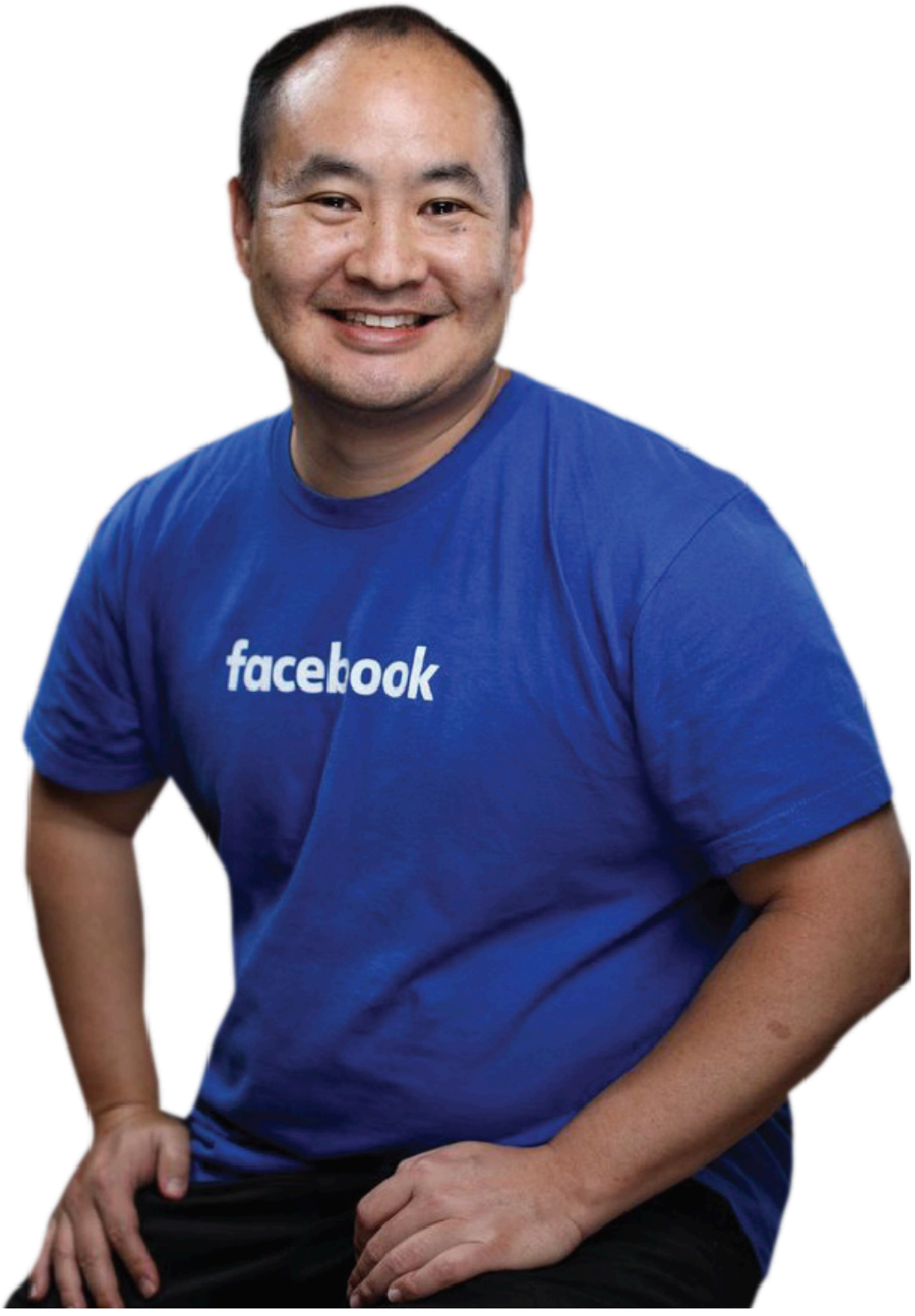
- Always include the quoted person's headshot before his or her quote is introduced.
- Italicize quotes
- Most of the time, quotes should be a lighter color than the body text, typically gray.
- Never forget the open and end quotation marks.

WE DON'T WANT EVERY LEVEL 1- 2 VA'S WORK TO MUST GO THROUGH QA BY THEIR TEAM LEAD, FOR TWO REASONS:

- QA work creates bottlenecks and slows down the deliverables although sometimes necessary.

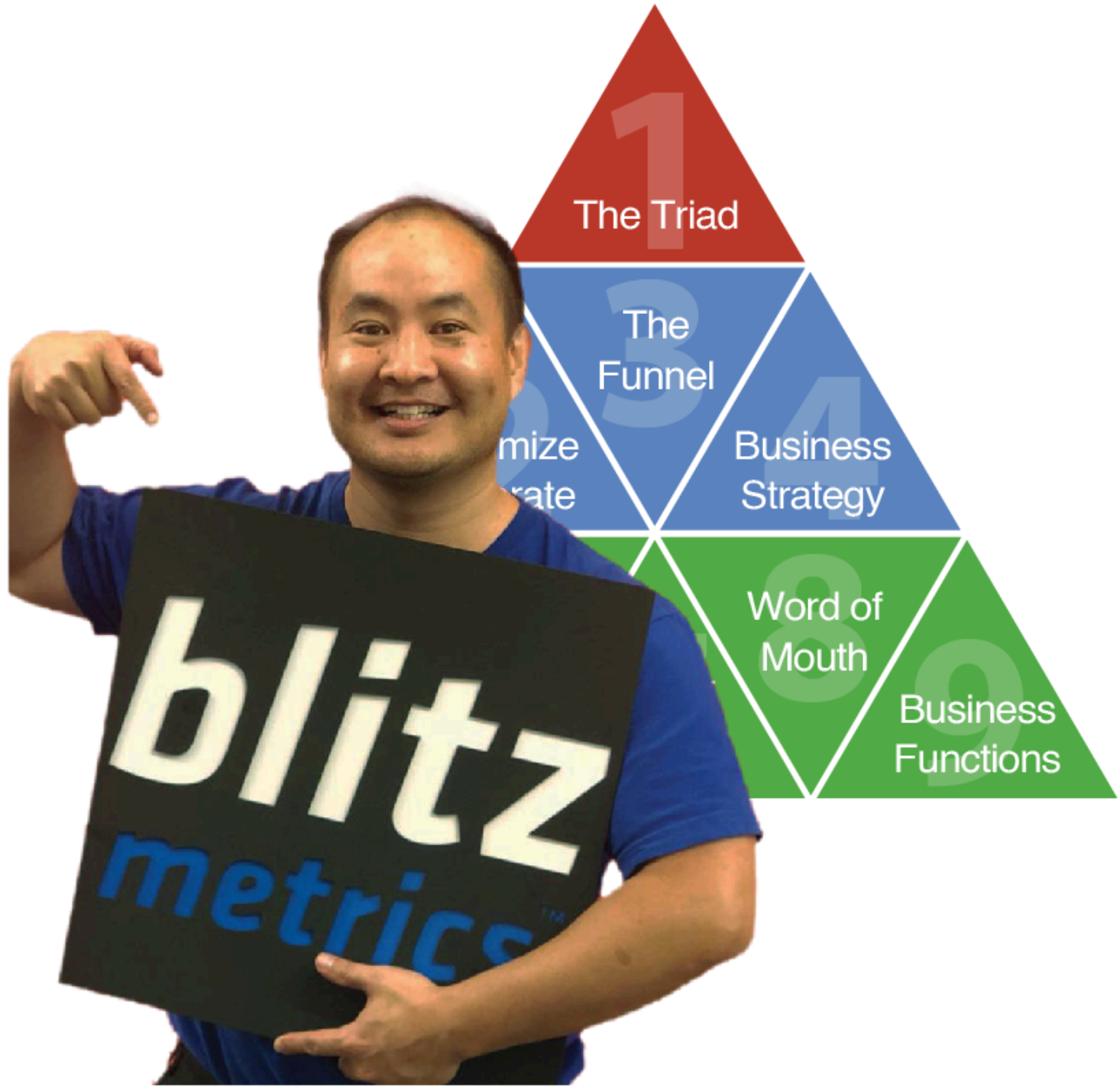
- We should be able to rely on our trained team members to deliver results to our expectations without going through QA by Team Lead.

But when we see a trend of poor workmanship from the team members, the business leaders and myself may ask that the work goes through QA by the Team Lead temporarily. This brings back some accountability to the Team Lead to re-train or let go of the team member.



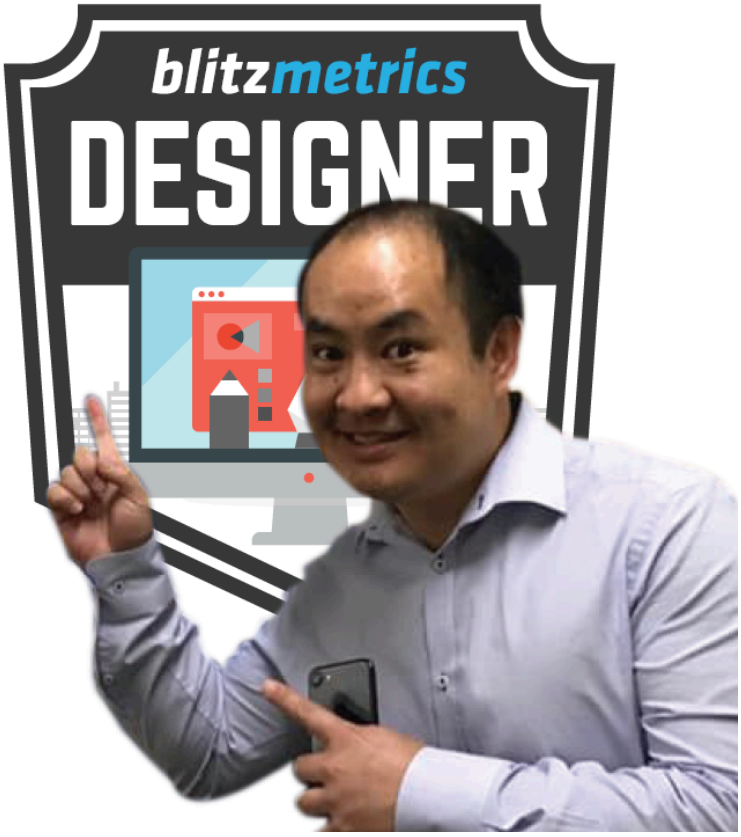
NOTE TO ALL GUIDES:

Instead of showing Dennis as the CEO of BlitzMetrics, say he is the creator of the Nine Triangles Framework.



Submit a small summary and your answers to the test questions and get these badges. Email us at operations@blitzmetrics.com





Appendix

Pending Process Updates

Below is a list of guides that a process specialist should incorporate to this Google Document. We have a “Pending Process Updates” chapter so our teammates can view the “raw” version before we incorporate or synthesize the information to the guide as a whole.

Dennis wrote in Create New Design [Cover page of BlitzMetrics Access Checklist Google Document]

> Let's name our files with the company first-- to prefix with blitzmetrics_, chirorevenue_, niftythrifty_, or inspect_, for example.
> See my earlier explanation about how we stitch together images only when we don't have our figureheads together-- and my explanation of why pictures together are better.
> Instead of cutting out the people, please include the rest of the picture, doing whatever you need to make the rest of the text readable.
> Let's follow the rest of the guidelines we have for guides and all documents, For example, we show the file name in the bottom.
> ...
> And when we skin documents, we don't want to skin only the cover.
> We want to keep the theme and content in line with the skinned version. So for ChiroRevenue, we want to sprinkle in pictures and examples specific to ChiroRevenue, which largely will have our main figureheads (Shawn and Tristan), plus other well-known chiropractors with Tristan (Ed Cordero, Lacey Book, Frank Ju, Brandon Brown, etc).

---------- Forwarded message ---------
From: **Tristan Parmley** <tristan@chirorevenue.com>
Date: Wed, Mar 17, 2021 at 2:15 AM
Subject: Re: New Process: Turning Videos Into PDF Guides Using Designrr
To: Tristan Parmley <tristan@chirorevenue.com>
Cc: Graham Troxel <graham.troxel@chirorevenue.com>, Juan Martho Agdan <juan@chirorevenue.com>, Dennis Yu <dennis@blitzmetrics.com>

PS: Designrrr looks like it uses Canva's API and stock source. We have pro - so for lightweight stuff we should use it to turn around quickly.

On Tue, Mar 16, 2021 at 10:56 AM Tristan Parmley <tristan@chirorevenue.com> wrote:

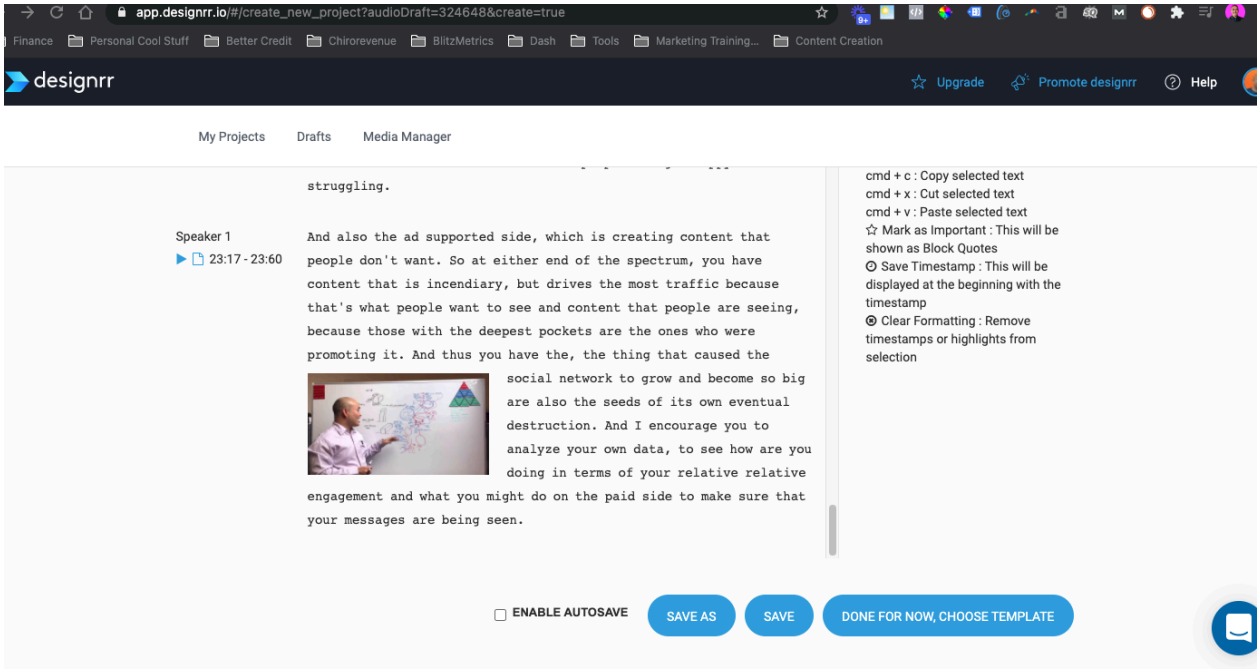
Getting Started

1. Get long form video to Youtube.

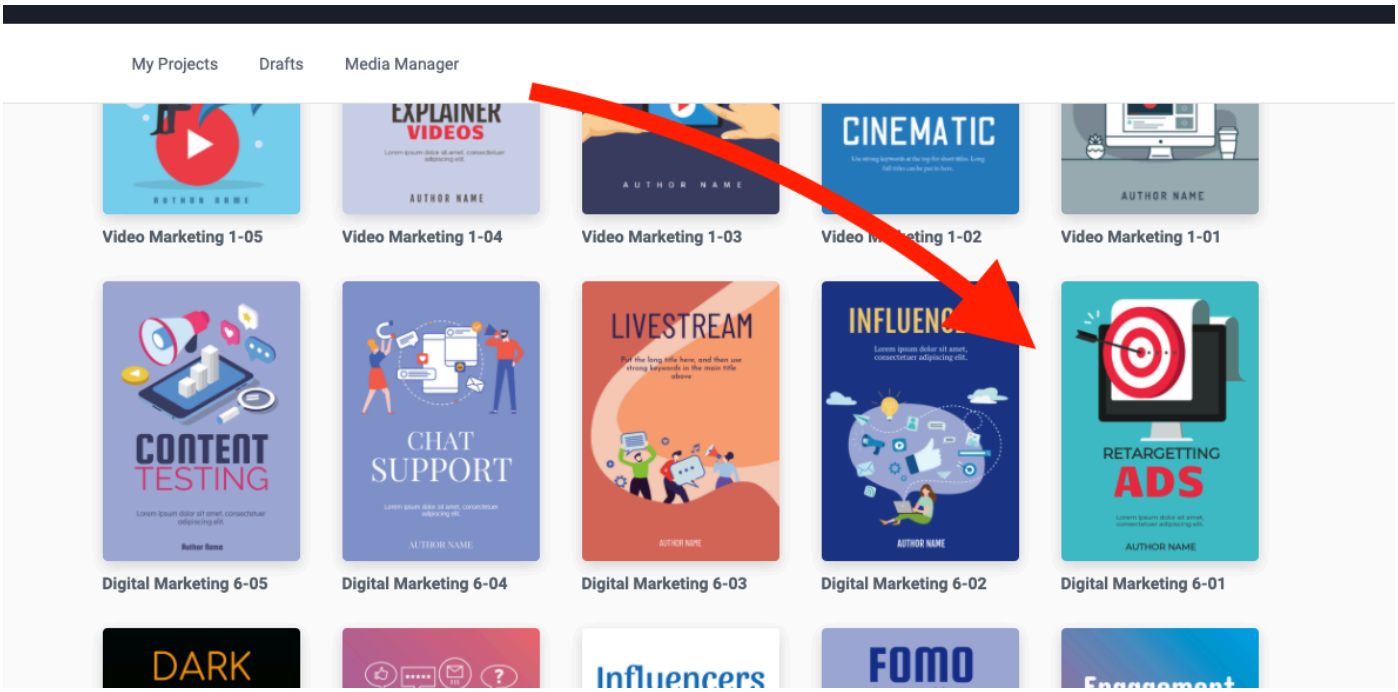
2. Pull Video for Designrr
- app.designrr.io
- dennis@Blitzmetrics.com
- [redacted]

3. Start New Project > Import From Youtube > In This Case We will use https://youtu.be/RK0_8DhhdMs from Digital CEO and the Newton book.

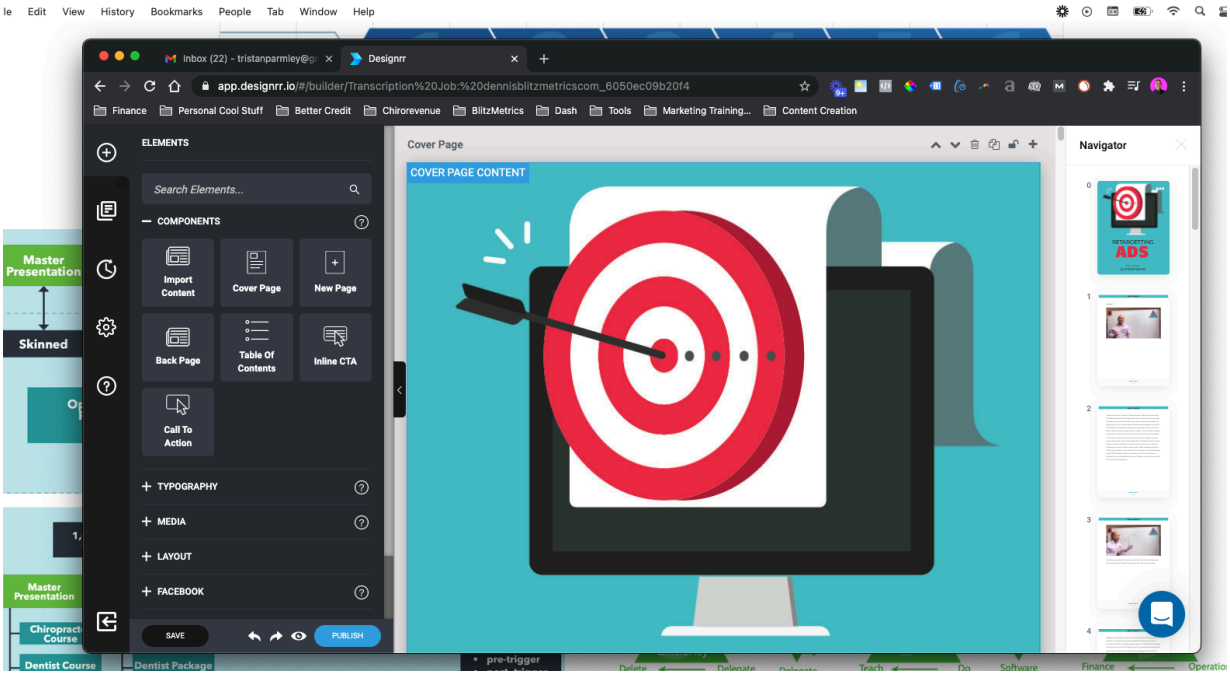
In this case we have the Facebook Algorithm Explained.



Clean up the transcription, and choose a template. Pick a relevant-looking format - we're not here to make pretty designs, we're here to get things published.



Begin editing!

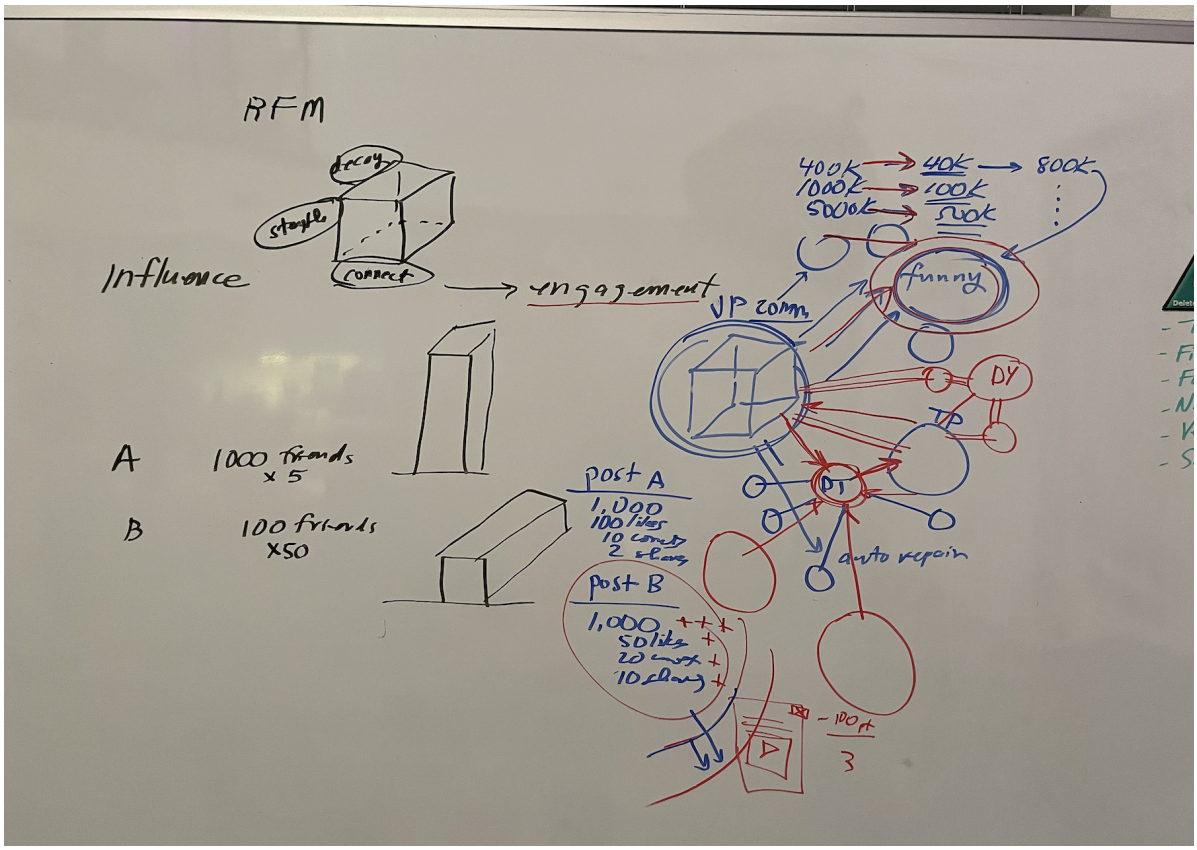


Phase 1 Edits

1. Format and brand the docs accordingly for whoever owns the document
- Footers
- Headers
- Global Headlines / paragraph styles
- Use Grammarly to catch small details - Designrr is meant for formatting and editing, not as much text.
- Use this video tutorial from Designrr for help https://www.youtube.com/watch?v=BzMTGGwSrzM

2. **Insert SCREENSHOTS** from the video in the appropriate position of the doc, usually just after a drawing or a session so it's large and clear.
- These will be used for illustrations and designs.

In this case we have



This is a final drawing made by small illustrations throughout the document.

3. **Delegate All Designs/Illustrations**
- These are LVL2 Tasks in the Design Quue
- **Because** there is a video supporting it, it should be done in **1** iteration.
- 24-hour turn around
- Illustration should be named Company/Client_DocumentName_IllistratrationName
- Provide the folder for uploading the Final INDD
- Link to the draft in Designrr.

Phase 2 - Final Editing
- Upload all illustrations in place of the sectioned screenshots
- Create a table of contents
- Read each page aloud as if you are giving a keynote to check for micro-errors.

In total, an E-book should take 6 hours across 2-3 people.

1 hour in prep and software - LVL 1
1 hour in transcription / detail clean up for screenshots LVL 1
1 hour in formatting, cleaning - LVL 2
30 minutes per illistration (maybe up to 4 since we have so many) - LVL 2
1 hour to finalize QA, read aloud, troubleshoot, and finalize. - LVL 3

---------- Forwarded message ---------
From: **Tristan Parmley** <tristan@chirorevenue.com>
Date: Wed, Mar 17, 2021 at 12:02 PM
Subject: Re: (BlitzMetrics Marketing & Sales: Marketing - Content and Checklists) QUICK GUIDES

Correct Dennis, I've pulled in Juan. The easiest way to do it while maintaining our momentum is in our Master Docs.

One Pager > Quick Guide > Full Guide > Presentation Version all in one master DOC

Then those can get cut into their PDFs, that way all of the source context is still in one place (not 1,000 orphaned documents) and we can move forward with the PDF cuts as the only variations.

Kind of like a podcast getting cut into highlights.

Juan - can you make sure the processes for One-Pagers, Quick Guides, Full Guides all reflect this?

This way, when we make an update in the Master Doc we can also quick search that process or template/link and fix quickly, highlighting so in our Quarterly document updates we know what's been added or removed :)

On Thu, Mar 11, 2021 at 12:20 AM Dennis Yu <dennis@blitzmetrics.com> wrote:
Time to revive our "QUICK guides" process (see thread here), which are shorter ebook versions of our guides.

We can add in pictures and run through a tool like Designrr (don't need a design VA) and add in text from conversion.ai to pump them up to 50 pages and submit to free-ebooks.net, which is Warren's site.

---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Wed, Dec 2, 2020 at 9:46 PM
Subject: Fwd: (BlitzMetrics Marketing & Sales: Marketing - Content and Checklists) QUICK GUIDES

Juan and Dan,

Please help us revive the QUICK guide versions of our courses.
Juan-- I sent you an explanation of how QUICK guides fit into what we're doing a couple days ago-- to augment the thread history here.

Dan-- we want to have the QUICK (or we can call them MICRO or MINI) versions of our courses in LearnDash, too.
Prioritize by what's gotten us the most revenue and traffic, as usual.

Can't go wrong with the SAE overall, Agency Management, each phase of the SAE, and personal branding.
The Course Builder Course (see the guide version) has this in more detail.

30 people on this thread, by the way-- so Melanio should remove the ex-team members entirely from our systems, then remove anyone not directly helping on this thread.

We will have parallel versions as BlitzMetrics and ChiroRevenue-- to use the Blitz ones now and migrate everything to the ChiroRevenue (chiropractors) and Digital CEO (anything else) brands.

Brands are not companies, by the way-- in the same way that Cheetos is a brand of Frito-Lay.

FYI to Max, our content/copy master.

---------- Forwarded message ---------
From: **Christian Calaway (Basecamp)** <notifications@3.basecamp.com>
Date: Thu, Jun 6, 2019 at 9:46 AM
Subject: Re: (BlitzMetrics Marketing & Sales: Marketing - Content and Checklists) QUICK GUIDES
To: <dennis@blitzmetrics.com>

| For visibility, we will actually want the QUICK guides to be the strategic content from the course.

I misunderstood the difference between conceptual and strategic content when I got started with this.

I updated my to-do to reflect this.

1. You have to change the title of the file using this syntax:
    - "niftythriftydentist_access_checklist_v"N.N_YYYY_MMDD.
    - Where N is version number. Increment each new iteration by 0.1, e.g. v 1.1, 1.2, 1.3, etc.
    - Y is year
    - M is month
    - D is Date
2. Name the next iteration is niftythriftydentist_access_checklist_v"1.1_2021_0317".
3. Apply the comments I made in the PDF.

---------- Forwarded message ---------
From: **Tristan Parmley** <tristan@chirorevenue.com>
Date: Fri, Mar 26, 2021 at 4:19 AM
Subject: Re: 75 new / 107 lost backlinks - www.seedsoflife.com/

> Team, please don't miss my notes so we can get this turned into a template that is duplicable and trainable for future Grahams and Coles -- who will be content, authority, and publishing experts one day.
>
> Dennis is correct, we don't have practitioners -- partially because we don't have the path for the hundreds of different tasks we do (including new ones we develop weekly) so most people burn out, quit, or go silent because they don't know what to do. They never make it that far.
>
> We see this for almost every zoom or email we've sent to become cross-posted or added to training -- it never happens.
>
> It gets buried for weeks.
>
> Finally, it gets picked up and we have Cole who is actively executing SEO spend 90+min watching, reviewing, and writing a summary based on the videos from scratch all by himself instead of leveraging our tools as step one to get it in the queues.
>
> Cole is training in other paths (like Plumbing and Optimization) be able to grow as this content master (since Max is absent) soon -- though we can't just have one Cole in the long haul.
>
> Since it takes a complete video review to make a post worthwhile with any authority, even as just a headline and simple sections, we have a single point of failure here. It's all on Cole.
>
> We still need experts to review, to get something live from the beginning, but without kicking off a process it's an undertaking we often underestimate.
>
> Graham and Cole are using the 3 components of authority training every day, and this content does require Analysis, which is why this is a Level 3 Task which Cole quickly grew to.
>
> I'm hoping Graham will be there soon, while he's doing Level 1-2 crossposting now.
>
> But we will never have Level1-2 pull-out pieces. We should be able to process content *once* by an expert, so it becomes an asset we can reference and repurpose multiple times (including the cuts) without Dennis having to personally do it.
>
> On Thu, Mar 25, 2021 at 12:34 PM Dennis Yu <dennis@blitzmetrics.com> wrote:

The underlying issue with this video and most trainings (which are not one minute, but usually an hour) is that we lack people who are competent implementers of the stuff we're teaching.

So even a massive amount of effort in tightening the process here won't overcome competency gaps-- even if we are super detailed in how we process transcriptions and queues. #LDT and #CCS are inviolable principles, like gravity and conservation of momentum.

While we are building up people who are competent (having done something successfully at least 3 times, but hopefully many times more), **we can still take the entire video and turn it into an article with simple sections/headings.**

The mistake we've made in the past, which we don't want to repeat, is having someone who doesn't understand the topic attempt to chop up highlights. While we've seen people valiantly and confidently pull out pieces they believe are good, those snippets are not actually the meaningful ones-- and they get botched from lack of context and understanding.

Level 1 and 2 people who are not experts in SEO can still process long-form (trainings) on SEO by lightly editing out the pieces that aren't training (initial pleasantries and side discussions). They can still identify the components that are #MAA, filtering out the items not related to the topic.

This is fast and easy, even for the dozens of webinars and paid trainings that we can turn into articles and ebooks. We can still do this on paid and private training by not including the video itself and not mentioning particular client names and details where we're not allowed to share such specifics.

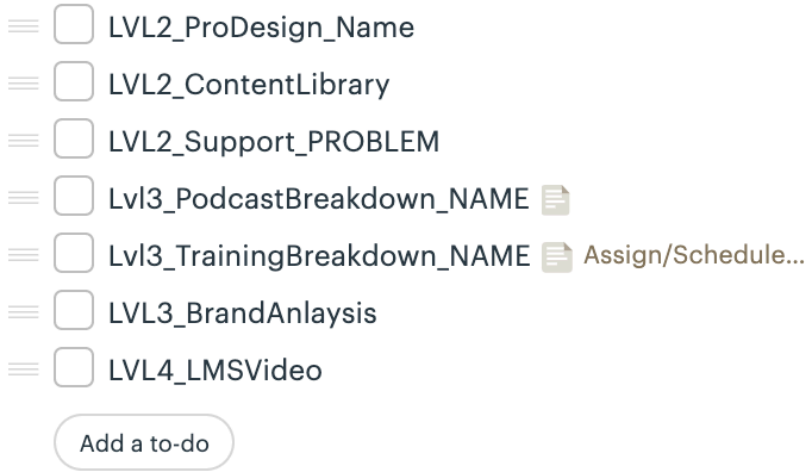
On Thu, Mar 25, 2021 at 12:08 PM Tristan Parmley <tristan@chirorevenue.com> wrote:

> Unfortunately, though Cole is an excellent critical thinker, this task is not specific enough to template.
>
> Unless we're going to publish the entire recording as an overview on SEO and not micro-articles to headline hunt.
>
> We will only do templated tasks, and I will template and rescue those processes when we don't have them,
>
> Thus, we need a filter, one person who can determine what needs to happen and when with these pieces of content (ideally Cole, then Graham)
>
> Here's the fix:
>
> We have a podcast breakdown template set of tasks for the 3 Components of Authority and Turning 1 Video into 100 -- so we could use the same model -> except we're searching for training since it's private the authority of "who and where" will be low. This will be the case for a ton of client calls (where we iterate a

ton of training), versus webinars & interviews (where we generate a ton of social content).

For this, I've pulled in the team to get our newest update for video processes underway.

Use the LVL3_TrainingBreakdown_NAME task.



As a quality check - Kristen Hamby is doing all transcriptions so we get exact words to use in articles or social. So Cole, kick this off as a task starting with Kristen as the R and Josh as the A.

For highlights and training - we will have the timecodes and snippets that you determine in the Transcription Document.

Josh H will oversee video snippets getting cut out and turned into micro-tasks based on those time codes.

Graham will observe for now -- so he can grow into this role of filtering content soon.

For Training Content - we have Designrr -- but this is is a client call more than a straightforward process, so we'll save that for now.

Important: This process is overkill for this video, which is precisely why we're using it to run through the Repurpose Process.

By next week, we will be digging up a ton of internal training that **will** be official documents and LMS videos.

So it's important to do this simple task right, so we don't miss the depth inside of other training.

Juan - make sure this doesn't get lost and gets added to our Designrr/Descript training. Everything starts with a clean transcription and then a Content Audit using the training inside the templated tasks. Once we get Graham and Cole caught up here, we will have a true Content Management Process that doesn't require Dennis and I to intervene. Consider it Internal Content #MAA to breakdown podcasts, webinars, and training videos which is why it's LVL3 as a template.

On Wed, Mar 24, 2021 at 12:36 PM Daniel Goodrich <danielg@blitzmetrics.com> wrote:

> Hey Cole,
>
> Here is the meeting I believe Dennis is referring to:
> Meeting Recording:
> https://us02web.zoom.us/rec/share/OOJYuF6O0NxFbKq698--JriiPjNa3KVBpBFy3rW6yVdz9PJBYBlMBH4cWF_MoYfh.GpL64Mz7e_3OG_OT
>
> Access Passcode: SeedsofLife1!
>
> On Tue, Mar 23, 2021 at 12:36 AM Dennis Yu <dennis@blitzmetrics.com> wrote:
>
>> Let's give them some love in PPC and SEO.
>>
>> Daniel-- could you help us along a bit?
>> We can delegate out the article writing (taking our meetings and turning them into helpful SEO articles on blitzmetrics.com) to Cole's team.
>>
>> ---------- Forwarded message ---------
>> From: **Ahrefs Alert** <se@ahrefs.com>
>> Date: Mon, Mar 22, 2021 at 11:31 PM
>> Subject: 75 new / 107 lost backlinks - www.seedsoflife.com/
>> To: <dennis@blitzmetrics.com>