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Sarah Linklater - From Chaos to Control - 5 Steps to Mastering Organisation in your Web Design Biz

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Hello hello. Welcome to From Chaos to Control - five steps to mastering organisation in your Web Design Business. In this presentation I'm going to run you through five steps to getting your shit organised in your web design business. But before we dive in, I just wanted to take a moment and introduce myself. My name is Sarah Linklater. I'm the resident admin geek behind Designer Admin, which is a support hub which provides web and graphic designers templates and courses to help them set up effective business systems and processes.

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I hail from Melbourne, Australia. I love coffee which is very Melbournian of me. I also love bright patterned clothes which is slightly less Melbournian of me. And I've been known as Slinky since I was about 8 and I've been operating my graphic and web design business called Slinky for the past 10 years. My niche in Slinky did it is organisations who create positive change in the world.

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So this is include universities like the University of Melbourne, RMIT, Central Queensland University. It's also included a bunch of public sector organisations like the ABC, the European Union and Jobs Australia. And it's also included charities like the Australian Red Cross. But it's no accident that I have satisfied so many big name clients. A big

component of my success comes from being confident in my skills and project process, my ability to lead clients through their projects seamlessly from start to finish without skipping a beat.

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And I do this by, you guessed it, being shit hot organised. And although I think I am naturally inclined to admin and thrive on a well built system, it's taken me a really long time to get to this point. I've spent the last decade learning, building, tweaking and honing my systems and processes to get them to this point and there's definitely been a hiccup or two along the way. So today I'm going to give you some insider access to some of the organisational tips, tricks and systems I've learned and built over the last 10 years. Firstly, we're going to talk about the benefits of getting and staying organised in your web design business.

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I'll then walk you through my five steps to mastering organisation and these are all super actionable and broken down into bite sized chunks so you can start making an impact on your day to day productivity immediately. Lastly, we'll cover how to maintain your organised approach well into the future so you're in the right place for this presentation. If you're new to running your own web design business and need some guidance on how to stay organised and get shit done, or you find yourself struggling to focus or work productively on a day to day basis because everything is just a big old cluttered mess. And if number two sounds a little bit like you, you might be like my friend Jackie. Jackie has been a web designer for a couple of years, but her day to day work life is chaos.

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She spends ages looking for the latest version of a project file, her inbox is overflowing and she constantly misses or forgets clients, requests or makes mistakes because she's just not on top of things. She's constantly looking up the same how to hacks for her website builds and she feels constantly overwhelmed by her projects, is never really sure what she should work on next and she really struggles to maintain focus and just get shit done. Does any of this sound familiar to you? Because it does to

me. This was definitely where I started out when I first launched my business and let me tell you, it was a mess.

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But then Jackie, just like Sarah, sorted her shit out. Yay. She now has a space to be creative and actively problem solve for her clients. Our clients feel supported because she communicates effectively and she makes minimal mistakes. As a result, she now has all her website hacks and CSS tricks at her fingertips so she's not wasting a second during a build and she can prioritise her workflow and just get shit done.

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Sounds pretty great. Hey well, messy filing systems and overflowing inbox and general admin chaos really are a shortcut to stress filled days feeling overwhelmed and making mistakes. In fact, interact found that 19.8% of business time, the equivalent of one day per working week, is wasted by people searching for information. I know what you're thinking. That's crazy, right?

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Just think what would you do with a day extra a week? So are you ready? Let's Marie Kondo the shit out of your business. Step one is to clear the decks and get baseline organised in your web business. And to do this we're going to sort out your email and desktop because my guess is you likely spend oodles of time in there on a day to day basis.

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I know this tip isn't pretty or glamorous but it's essential as it's going to give you an organisational baseline to build on. Once you clear your metaphorical workspace decks of your clutter, you'll immediately have more space to think, breathe, concentrate and create better organisational systems for your biz. Before we start, who has a desktop that looks a little bit like this? Your desktop is the first thing you see when you turn on your computer and creating a calm, pleasant environment rather than a busy, cluttered one really helps both with your mindset and your productivity. And it's the same with your email.

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If you open your email and have like 300 or more unread emails and haven't filed anything, it's near impossible to separate the wheat from the chaff, see what is what and prioritise what needs to be done. And you might be thinking, yeah, it could be better, but surely I can skip this bit. It doesn't really matter that much, does it? Well, let me tell you that it does. As soon as you log onto your computer and your desktop or email account are an overwhelming, cluttered mess, you're creating a productivity sapping, overwhelming environment for yourself.

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It's a constant reminder that you need to be more organised. You're essentially allowing your computer to nag you every time you look at your desktop or your email. And who likes being nagged? It creates a sense of chaos which can extend into other parts of your work and day. It's impossible to locate anything or in the very least it's going to take you far longer than it actually should.

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And for the desktop, it just doesn't send a great message. If you're on a call and a screen sharing with your client and they accidentally see your cluttered mess of a desktop. And this is all supported by research which has shown that individuals with cluttered digital environments experience higher levels of anxiety and decreased overall focus. So keeping yourself organised can really contribute to reduced stress and improved mental clarity. So at this stage you might be sold, but are thinking, this sounds like a massive task.

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I don't have the time to sort through thousands of emails and desktop files. Well, you don't need to. Here's how to start gaining the benefits of your digital declutter. Immediately, have a quick, no more than 10 minute review of what's on your desktop and in your inbox. Is there anything you can action or file really quickly in your emails?

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Do you have anything valuable in your desktop like shortcuts that you use on a day to day basis? Or is it just an assortment of random files, junk and screenshots. Think about what actually needs to be on there. Then I

want you to create a folder called Filing in your computer files, not on your desktop. And also in your emails.

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I include the underscore so it stays at the top of my files. Now move all your old files in there. Now, I know what you're thinking, but Sarah, isn't this cheating? What about all those old files? If you want to get super slick and organised, spend 10 minutes a day filing those loose files in your filing folder.

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Eventually you'll get through them, but it won't feel like an overwhelming task. And you'll also feel the benefits of a detoxed desktop and inbox immediately. Think about those filing folders we've created as being similar to a storage unit for your house. You're just putting your clutter there so you can function and then you'll sort it out later on. So before we move on, I wanted to just give you a few little tips to help keep your email and desktop organised.

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Now we've got it to this point. So for emails, move things through your inbox really quickly. Don't use it as a storage location, otherwise your inbox will fill up really, really fast. I have a 48 hour limit on my emails. If an item takes longer to complete, it goes on a to do list and the email gets filed.

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Secondly, file or delete emails as soon as they've been actioned. And lastly, set up filters in your email system so you don't have to file every email manually. What this means is if I have, for example, the ABC is a client, I have a tag that assigns anyone that emails me from an ABC email address the client tag ABC and then I can just hit the file. Or in Gmail, which I use, it's called Archive. As soon as I respond to that email, it automatically gets archived and I don't have to manually file it every single time.

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In terms of your desktop, if you're anything like me, 90% of what clutters your desktop is screenshots because Macs save it there automatically. To stop your desktop from becoming overloaded with screenshots, you can change your screenshot location by selecting Command Shift 5 and clicking the option Dropdown. You can then create a generic screenshot shot folder. Or you can be super organised, which I always highly recommend, and file each screenshot using this method as you go. If you're on PC, you're set because you already have a screenshot folder.

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Now we've cleared the decks of our clutter, it's time to look at how we can stay organised on a day to day basis. And that brings us to step two. Fix your files and never look for anything again. In my experience, having a robust filing system is one of the easiest ways to keep on track and save time and create headspace for yourself. So this is what my filing system looks like at the top level.

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Now we unfortunately don't have time in this presentation for me to go through this in a huge amount of depth, but essentially you can see that all my business files are at the top and they all have that underscore before them which keeps them all at the top and separate from my client files and then each client has their own folder underneath. But the thing that I really wanted to talk to you about in this presentation because it was absolute game changer for me, is setting up a master project folder, which is this set of folders just right here in the middle. Essentially what it is is a bunch of empty folders within folders set up and ready to go. So when I start a new project I can simply copy and paste that file structure and I always know where to put a file and more importantly, where to find a file. Before I had this set up, I was definitely guilty of what I call project dumping, which is essentially just whacking all project files loosely in a F.

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And then when I go back in a few months time, I couldn't find anything. I didn't know what the latest variation of a file was. And it has definitely been a disaster. On some projects it's led to mistakes that made me look silly in front of clients, mistakes that could have been avoided if I just put

all my files in the right place to begin with. So if we take a quick look at this, you can see I have subfolders for every project stage and then subfolders within those folders for everything I might need on that phase of a design and build.

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I also have a released folder which is where I put everything I've sent to the client so there's never any confusion about what version they have seen. If you don't have a master filing system set up, I strongly recommend you get on it because it really did streamline my business so much. And before we move on, if you do want to learn more about the way I set up my design files, I do have a template filing system available to download for free on designeradmin.com so you can simply just copy and paste my filing system and start using it and tweaking it, customising it for your design business. The download also includes a video which runs you through my system and how I use all my admin files as well and it also gives you a few extra tips on file naming structures and further breaks down how I use each of the folders. Step three is all about prioritising your workdays and weeks by becoming the master of to do Lists.

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There are many ways you can go about to do lists. You can go lo fi on a piece of paper or a notebook or a post it note in your desktop. Some email programmes have to do lists built in. I know Gmail has tasks and many CRMs also have them integrated. I used to love an old fashioned piece of paper for this but now I use Trello which I love as I can attach items to cards, make notes on cards and I also have it hooked up to my email so I can create cards from an email.

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This is the way I have my Trello board to do list set up. I have a list for every single day of the week and on a Monday I add in everything that I want to achieve for the week but and I find this is crucial to being productive. Against every task I put the amount of time I think that task is going to take. Then each evening I plan out the next day and put a time next to each task showing when I will get it done by so you can see on Monday I've planned to do the A7 website by 12pm I'm going to have

lunch between 12 and 1. I'm going to work on the blueprint till 3pm and then I have in to invoice Tracy by 3:15pm Then for the rest of the week I have tasks assigned for each day with the amount of time I think each of those tasks will take.

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This is called time blocking and you can also time block things with your calendar. I just really like the way you can easily move things around with Trello. It just offers a huge amount of flexibility because I can easily drag and drop cards to different parts of the week if something comes up. I also have a list on this board for upcoming tasks so I can log any tasks I know I have to do but don't need to be done this week I also have a list called Awaiting feedback so if I'm waiting to hear back from a supplier or a client I move the item to that list and this just means it's not lost in the ether and I don't need to rely on my brain to remember. If you'd like me to share this to do list with you DM me and I will send it across.

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Before we move on, I just want to give you a few little tips for managing to do lists. The first one is put everything on a to do list. You'll create so much headspace for yourself by making sure everything you need to get done is on a list. Secondly, always leave flex time in your day. I find if I plan out my day from start to finish, account for every single minute, I inevitably don't achieve everything on my list.

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Firstly, things always come up and if you don't have any flex room built in, you won't get your original to do list done. Secondly, we're not productivity machines. There is a fatigue that comes with a workday. I find I inevitably slow down the further I get into the day. So allowing myself a little bit of flex time means I can step away if I need to.

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So moving on to step four, templating your workflow. If you template the shit out of your project process, your entire business will be more streamlined and more stress free. You're going to save so much time because you'll never need to start a proposal or a presentation or a client website manual from scratch ever again. But creating templates for your

entire design process can feel like a really overwhelming mammoth task and it can be really difficult to know where to start or to know how to develop what you've already got in place further. So in this step, I'm going to walk you through my step by step process that I use with my participants in my sort your systems and processes e course to help them set up their systems and processes from start to finish.

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The first step is to start with the big picture. When starting out with templates in your business, I really recommend starting by mapping out your entire workflow from start to finish. So this is my website process. You can see that my website process consists of six different phases and each phase comprises multiple different steps. So for you to get to this point, I recommend firstly starting with the phases.

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So that's these titles across the top. So I have onboarding, research and briefing, concept development, site build, site delivery, and offboarding. Yours might look a little bit different to mine and that's absolutely fine. I really recommend that you lean into what you're currently doing rather than change it up just because you've seen what I'm doing on screen. Make your process your own and do what suits you, your business and your clients best.

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Once you've got your phases written out, write out the steps underneath each phase. Once You've got this overarching process in place, it's much easier to then figure out what to prioritise and how all the puzzle pieces fit together. So the next step is to go through and start listing out what templates you need. Pretty much for every stage of this process I have templates I use and emails that go along with them. So if we take a quick look at the onboarding phase.

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For onboarding, the first step is the potential client downloads or is sent a price list. So for this I have a price list and then I have an email and a follow up email template. The client will then contact me or book in a discovery call. And for that I have a list of discovery call questions to

guide me through the discovery call. After the discovery call I will then put together a proposal contract and sign off for them.

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And for that I have a proposal template along with an email template and also a follow up email template. If they don't get back to me once the proposal is signed off, I then send across the invoice which I use an invoice template and I have an email for that as well. Now unfortunately we don't have time in this presentation to run through my entire process in really great detail, but I did just want to flip through this really quickly as I think it can be really useful to see someone else's process when establishing your own. As I said before and just like with the filing system, be conscious of making your own and doing what works for you. So before we move on to step five, I just want to give you a few little tips about building out your templates.

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So make sure you start with the high return on investment templates. So those are the templates that you use most often and will save you the most amount of time. There is no point starting with a document that you use once a year if there are documents that you can use every single week because you're not going to get your bang for buck out of for them. Secondly, make sure you know where everything is and it's easy to access. Once you've set up your templates, you can actually consider saving them in your template master filing folders that we talked about before.

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So for example, my presentation templates are in indesign files, so I have those templates already saved in the project folder structure that I provided earlier. So when I create a folder for a new project and copy my folder structure in there, all the files I need are sitting there ready to go. Just make sure you template as much as your business as possible so you don't have to restart from scratch every single time. Step five is nailing your process with checklists. Checklists can come in many forms.

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There are oodles of project management apps and CRM systems out there that you can use together or in isolation that allow you to do all sorts of amazing things and create a seamless customer experience. But ultimately, when it boils down to it, many of these tools are simply designed to walk you through your process from start to finish so you don't miss a beat. They're essentially super fancy checklists that also help you automate your process. Now, while I love a bit of automation and I think it can save so much time and headspace, I actually think it's far more important to get your base systems and processes sorted before you start integrating project management tools, purely because you're going to then choose a system that suits your process rather than changing your process to fit a system. A checklist can be as simple as a list in a Google Doc that guides you through your project from start to finish, so you don't waste any time or energy wondering about what is next or wake up in the middle of the night remembering something that you should have done.

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My weapon of choice for managing my process and checklist is Trello. For every project I have an internal project management board which provides a step by step checklist to guide me through my projects without thinking about it. So for example, when exactly do I set up a client in Dubsado? Is it before or after the discovery call? When do I create their project files?

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Is it once the contract is signed or after the first invoice is paid? And this even extends to more technical aspects of a project. So when do I create and submit a sitemap? I know I do it at the end of the project, but is it before or after the launch? And what plugin setting do I have to edit beforehand?

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Essentially my checklist tells me what to do and when to do it. You can see I have broken up my checklist by phases in the project and I also have an admin list which I use to link to important documents like timelines and also my proposal. And I also have a notes card on there just in case I need to take some notes throughout the project. So each

card on the board contains everything that I need to complete that step. Here is my setup recapture card.

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You can see it gives me step by step instructions on how to complete this step so there's no second guessing or even thinking about it. I simply walk through my project board from start to finish for each project and I know I haven't missed a beat. I also have a card on this board for CSS tips and tricks that I regularly use so I can go in and grab any code that I use regularly really simply and quickly. And this Trello board is set up as a template board, so I simply duplicate it for each project and then start from fresh every single time. So once you've gone through and taken these five steps to get organised in your web business, it's really important to note that you have to maintain your organisational systems and also let them evolve.

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Let's talk about maintaining first off. So despite our best intentions, often things slip. I find the busier I am, the more likely I am to let things slide. So it's really important to have a strategy in place for me to stay on top of my organised system. I found putting recurring time in my calendar to help me stay decluttered helps me stay on top of this.

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I use this time to make sure my desktop and email stay decluttered, that I'm using my to do list effectively, and to make any tweaks to my system. I find an hour a week goes a really long way to helping keep my systems working effectively and continually evolving as my business grows. Lastly, if something isn't working, tweak it. Don't see your organisational systems as static. If something isn't working, try something different.

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Everything I've shown you from my business in this presentation is a live, constantly evolving system. I'm constantly tweaking and adjusting it so it fits my process better and better every time I use it. If you have a bad encounter with a client, for example, review your terms and conditions and see if there's a way that you can better protect yourself in future. Or if you can't find something in your filing system, move it. You have to

make your systems and processes work for you and it can be a bit of trial and error and learning that's involved in that.

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So make sure you're open to it. Now, I just wanted to take a minute and talk about the epic Page Builder Summit Powerpack because it is chock a block full of value. If you haven't checked it out yet, I highly, highly encourage you to because there is so many cool templates and courses and resources in there. I think it's over two and a half thousand dollars worth of value for about \$147, so it's absolutely epic. My contribution is a double duo of two of my most popular Web Design Templates first off is my web Proposal Template and Project Timeline Generator.

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It includes my 14 page proposal template including cover page, introduction, working with me section, deliverable section, testimonials page, my process section, fees page, sign off and Terms and conditions. It also includes my Project Timeline Generator which has saved me so much time on projects. Essentially it's a spreadsheet where you can enter your start date, tweak your timelines and your project dates will automatically be created. And it means if your client pauses the project, you can just go in and edit the dates and it will be automatically recreated. It's super handy.

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The second template is my Web Sign off template. If you've ever had a client come back to you after a project is complete with a typo they want fixed or part of the design, they want tech tweaked, you need a web sign off in your life. Using this template will keep your clients accountable and make sure they understand the financial and time repercussions of further tweaks to their project. The other thing I just wanted to let you know about quickly is my Web Wonder Template Bundle which includes all the templates I use in my website process. Yep, all available for you to download and plug and play in your business.

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I have a sneaky discount which will be up for the next seven days for anyone watching this presentation. If you use the code PB25 at checkout

you can save a whopping 50% for the next seven days. All of the Designer Admin templates are written in straight up language so you can use them as they are or apply your own personality to them. They are fully customizable so you can use the existing design and just add your own branding to it, or you can copy and paste the text out of it and use it in your own design. They are available in a variety of different file types, currently available in InDesign, Canva and Affinity and Google Docs.

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You also have lifetime access to all the updates on the documents. They are instantly downloadable so you can start using them immediately and have video manuals showing you how to set up the template and talking you through how I use them in my business. So thanks everyone for watching. If you want to connect and talk more Admini tips for your design business, you can join the Salt your System Hub Facebook Group. It's a place for designers to support each other on admini related things.

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We talk proposals, templates, getting paid, dealing with clients and setting up your processes and systems, all with the goal of focusing on admin less and freeing up some much needed creative headspace. You can also check out designeradmin.com to have a look at the templates I have mentioned today and other free resources. I'm also on Instagram and Facebook at [designeradmin](https://designeradmin.com). Thanks for watching. Bye.