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CTRL+CLICK CAST #065 - Time-Saving Tools for Running a Small Business

[Music]

Lea Alcantara: From [Bright Umbrella](#), this is CTRL+CLICK CAST! We inspect the web for you! Today we are sharing time-saving tools for running a small business. I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

Emily Lewis: Emily Lewis!

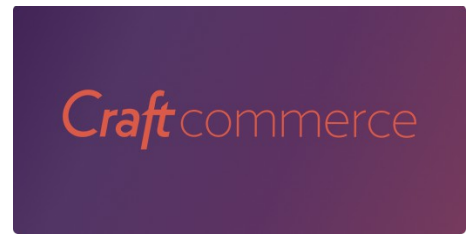
Lea Alcantara: This episode is sponsored by [Craft Commerce](#), a brand new ecommerce platform for Craft CMS. If you're a web shop that likes to create custom-tailored websites for your clients, you're going to love Craft Commerce. It's extremely flexible, leaving all the product modeling and front-end development up to you, and it's got a simple and intuitive back-end for content managers. To learn more and download a free trial, head over to craftcommerce.com.

[Music ends]

Emily Lewis: If you're a regular listener, you may have noticed a bit of a topic change. Unfortunately, our friend Aaron Gustafson is sick, so we'll tackle the topic of progressive enhancement at another time, which means today we're moving up one of other topics from the queue and sharing all of the time-saving tools Lea and I used to run Bright Umbrella.

Lea Alcantara: And we've said over and over again, especially in our practical pricing episode that time is money.

Emily Lewis: [Agrees]



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Lea Alcantara: And the more time you free up, the better you can spend it more productively in life or work, so let's share how we save time. Let's get started with tasks in project management.

Emily Lewis: Okay, so it's probably no surprise for most of our listeners that we use [Basecamp](#), it's a pretty popular project management tool in our industry and I guess outside of it.

Lea Alcantara: Right.

Emily Lewis: We use Basecamp too and it's interesting, we use it for project management, but when it comes to actual client involvement, it's pretty much just the messages and file management.

Lea Alcantara: Yeah.

Emily Lewis: We've mostly used to-dos internally, meaning we keep those. You can flag them as private so the client doesn't see them. I mean, even when we were assigned to-dos to clients, they don't check them all or reference it.

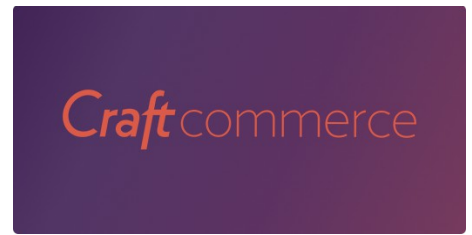
Lea Alcantara: Yeah.

Emily Lewis: So the to-do lists are really just a reference for us, but for running a project and communicating with the client, we're using the messaging and the file upload feature of it primarily.

Lea Alcantara: Although we're kind of shifting a little bit too since there are some restrictions with file management with Basecamp, they do have Google Docs integration, which we haven't used ourselves.

Emily Lewis: Yeah.

Lea Alcantara: But what we do use more and more these days because of the file upload restrictions is links to [Dropbox](#).



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Emily Lewis: [Agrees]

Lea Alcantara: And that makes things a lot more convenient, and especially if you are uploading images from Dropbox, Basecamp just automatically shows the image as if...

Emily Lewis: Like a preview.

Lea Alcantara: Yeah, like a preview of the image, which makes everything really convenient.

Emily Lewis: Yeah, good point, so it's mostly now that we're moving, because we were uploading files and encouraging the client to upload files.

Lea Alcantara: Right.

Emily Lewis: But now we've been, like you said, just putting in links to Dropbox and then if a client uploads a file, particularly if it's large, we pull that into Dropbox and put a reference to the Dropbox file in Basecamp rather than Basecamp doing all the storage.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: We'll talk a little bit about Dropbox in a second. I think it's worth noting that the reason why I know I prefer using Basecamp for the messaging is that things for me just get lost in email no matter how often I'm trying to archive an important discussion and I use labels aggressively and somehow I can't find it and the search doesn't find it somewhere in the ether.

Lea Alcantara: Right.

Emily Lewis: But Basecamp, it's always there. It's a record of proving that you've had a discussion, what the points of that discussion were, and it's really easy to reference back and remind the client, "Oh, you said this back then. Is this still where we're going with this?"



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Lea Alcantara: Right, and I'm appreciative of the Basecamp search options there too.

Emily Lewis: [Agrees]

Lea Alcantara: For whatever reason, it just is easier to search through that than thousands of thousands of a mixture of private/public emails in one inbox. Here, at least you know it's a search to one particular project or one particular client, which makes things really, really convenient, and I can't emphasize enough the fact that there's a repository for this communication.

Emily Lewis: [Agrees]

Lea Alcantara: So we kind of referenced it a little bit with the to-do list that even when we have them public for the client and we assign it to them, they might not use it, but what's important is that it's there, that they see it, that the task has been assigned so that there's no gray area over what was expected for anyone.

Emily Lewis: [Agrees]

Lea Alcantara: Whether it's an expectation on us as Bright Umbrella vendors or them as the client.

Emily Lewis: [Agrees]

Lea Alcantara: The fact that there's just really less room for error when you use something like Basecamp, and that really saves time going, "Well, did you mean this? Did you mean that? Blah, blah, blah."

Emily Lewis: [Agrees]

Lea Alcantara: Well, search through the archive, right?



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Emily Lewis: Yeah. And even more specifically in terms of how we use that aspect of Basecamp that has been probably, I don't know, but I think "game changer" is too strong of a word, but our clients really like it is that once a week we post a check-in to the client project in Basecamp and everyone on the team, even they aren't the people we're dealing with one on one during the week for discreet tasks, but everyone on the team gets looped in. They know what they did last week, what's coming up this week and when their involvement is necessary, and over and over again, our clients are telling us how amazing that that is for them to not only ensure that they don't have to make sure the team is up to date because we're doing it.

Lea Alcantara: Right.

Emily Lewis: But also giving them a heads up, "Oh yeah, I am going to have to do this for them this week, and I need to involve these team members" kind of thing, it really, really helps a lot with communication, setting expectations and really making a client feel that even in those weeks where you aren't doing a lot of client communication, that they know you're working on the project.

Lea Alcantara: Yeah, absolutely. I feel like, again, erring on the side of slightly over communicating, but I want to emphasize the fact that these check-ins aren't like giant paragraphs, they're not books, they're not articles. They're literally, "This is what we're going to do, bullet point, bullet point. This is what happened last week, bullet point, bullet."

Emily Lewis: [Agrees]

Lea Alcantara: And that just sets a clearer tone over what's going and overall, that saves everyone a ton of time because I think before we did this, there was a lot of back and forth of messaging just like okay. It's not necessarily because they didn't trust what we were doing, it's just that they were



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confused over what their involvement needs to be for that week because they also need to plan their week out.

Emily Lewis: Yeah, good point. So we also use Basecamp really heavily for managing this podcast as well as managing Bright Umbrella itself as opposed to client project.

Lea Alcantara: Yeah.

Emily Lewis: And I think one of the things that's interesting about how we use Basecamp is to-do lists, specifically if you have ever used Basecamp Classic, you may recall that they had this really wonderful feature that allowed you to create a to-do list template, and it was basically, you know, let's say, every week you have a set number of tasks you do every week. Well, you create that template and instead of creating the to-do list from scratch each time, you just use that template to create a fresh to-do list. Well, Basecamp 2 dropped that functionality where I just do not even understand why at all.

Lea Alcantara: Yeah.

Emily Lewis: But what we've done is sort of create our own version of these to-do list templates in that I create a to-do list. I call it a "template," and every week when I have to create, and every week we have social media to-dos, and every week we have a business development to-dos and so on, and so what I'd do is I just copy, and Basecamp gives you a feature to copy an existing to-do list and it carries over the people who was assigned to it, et cetera, and so I just copy that to-do list each time and then assign the people and assign the to-dos. Basecamp Classic did it much more seamlessly and elegantly and so it's a little clunky, but it definitely saves time not only for me to create the to-do



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list each week. I'm not doing it from scratch. Because you can't, I mean, you could technically copy from the previous weeks.

Lea Alcantara: Right.

Emily Lewis: But the people check them off as done, you have to uncheck them off. It's just a pain in the ass is what it is.

Lea Alcantara: Yeah, yeah. [Laughs]

Emily Lewis: And so these template to-do lists that we have, it makes it easier for me to get them set up, but if I ever need Lea to do it or our assistant Erin to do it, they can go to the template. They don't need to know what the to-dos are for the week. They can just copy that one that I created. So it's a little bit of a hack to it, but it gets the job done and it definitely saves time versus the manual option.

Lea Alcantara: Yeah, absolutely, and just having that template there beyond just saving time, it just emphasizes that there are a lot of repetitive tasks, common tasks to every single business tasks, I guess. [Laughs]

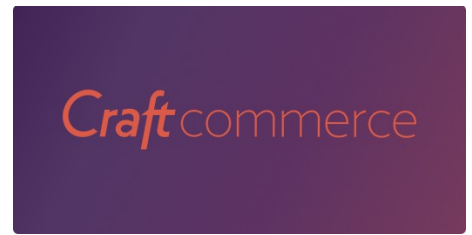
Emily Lewis: [Agrees]

Lea Alcantara: A big task like when we are creating a proposal, there are a lot of things that you know you have to get done, and without these to-do lists, we could forget it.

Emily Lewis: [Agrees]

Lea Alcantara: Like we could forget like really, really....

Emily Lewis: Easily.



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Lea Alcantara: Really easily, and certain things that are very common sense like following up if they haven't responded, but if it wasn't in the to-do list because you're busy doing your job, you might not do something that simple simply because it wasn't cited. Now, I do want to mention, you mentioned Basecamp Classic and Basecamp 2. They do have Basecamp 3 out there. We haven't tried that ourselves, but I did a quick google, and it looks like they'll be incorporating the to-do templates back later this year in Basecamp 3.

Emily Lewis: Oh, smarts, finally.

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Lea Alcantara: It's not out yet. They're like, "Hold on tight, it will be there in a few months." But it's nice to see that they're actually, like they're stating that it's going to come back, unfortunately, not for Basecamp 2.

Emily Lewis: [Agrees]

Lea Alcantara: You have to be Basecamp 3 subscriber, but that at least is a positive move forward I think.

Emily Lewis: Yeah, and continuing with the template concept in Basecamp 2, they do offer you project templates, which essentially lets you create a brand new project that has a set number of to-do lists, even set number of messages already established in it. It's also kind of crappy in Basecamp 2 compared to Basecamp Classic.

Lea Alcantara: [Agrees]



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Emily Lewis: Because what we intended to do is we set up a project that has all of our workflows for a new client project, and it's got the to-do list for client onboarding and to-do list for setting up our local environment, and then it's got a to-do list for all the stuff we do for EE security, and then, well, we started using Craft, and we're like, "Oh, do we want to maintain two separate ones to have half of it is redundant and half of it specific to Craft?"

Lea Alcantara: Yeah.

Emily Lewis: And we realized no, because then we are having to maintain two sets of the stuff about like client onboarding and setting up a local project.

Lea Alcantara: Right, right.

Emily Lewis: And so we just have this massive, huge project template that has all of our Craft to-dos, all of our Statamic to-dos, all of our ExpressionEngine to-dos. [Laughs]

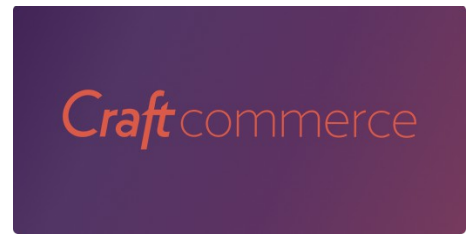
Lea Alcantara: Right, right.

Emily Lewis: And we go through and delete them. It saves some time from creating it from scratch, but it's nowhere near as great as Basecamp Classic was for those sort of template projects, but we still do rely on that because we're very discreet with our to-dos. We get very narrow.

Lea Alcantara: Right.

Emily Lewis: Because as Leo was saying, it is super easy to forget the details when you're dealing with two clients plus your own business plus the podcast plus everything else in your life.

Lea Alcantara: Right.



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Emily Lewis: So keeping track of the details is really important to us, and it's one of the things that make us stand out from our clients. We are really excellent at project management, and it's one of the things our clients love about us.

Lea Alcantara: Yeah, and I really don't know how we could function without these templates or to-dos.

Emily Lewis: [Agrees]

Lea Alcantara: And what's really easy too is that once you've set up the template, if we identify a new task that falls under it, like we've been changing our proposal process over the past couple of years actually, and more recently since we've been really intentional about how we want to deal with prospects and clients, and what we've just done is essentially break the task down even more.

Emily Lewis: [Agrees]

Lea Alcantara: And we're not starting from scratch at all because we already had the initial template of like set this contact up, set this whatever.

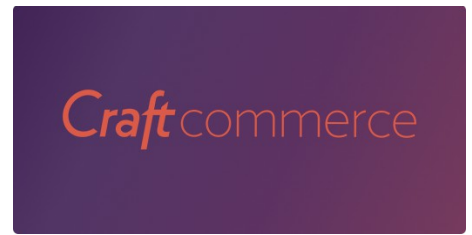
Emily Lewis: [Agrees]

Lea Alcantara: So all we're doing is just adding to it and removing things that didn't make sense.

Emily Lewis: So Lea, I know that this is how we're using it internally as a team, but when it comes down to as actual to-dos, you don't really use Basecamp that much anymore, are you?

Lea Alcantara: I use it as like an overall reference for the day, and what's interesting is how you and I kind of handle the same tasks from the same place.

Emily Lewis: [Agrees]



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Lea Alcantara: Because I know you primarily use email.

Emily Lewis: [Agrees]

Lea Alcantara: But for me, what I end up doing is I go to the Basecamp open to-do's list and then I make sure that it's on the "do today" and so that gives me overall look of all the tasks that I'm supposed to be doing today or that I'm supposed to get done today, and then what I end up doing or what I used to do was I just have that screen open and then I try to check things off, but I got a little scrambled still even with that one page.

Emily Lewis: [Agrees]

Lea Alcantara: And what I've started to do this year, specifically in 2016, is something called the [Bullet Journal](#) method. So it's basically going back old school and buying a notebook and pen and paper.

Emily Lewis: [Laughs]

Lea Alcantara: And what I end up doing is the first thing I do in the morning is I open up "your open to-dos for today" in Basecamp and then I open up my Bullet Journal and I order the to-dos in the importance and the order that I want them to get done.

Emily Lewis: [Agrees]

Lea Alcantara: So now, it's like less scrambled and sometimes the to-dos that we have written on purpose on Basecamp, it's full of super details like the URLs and all those kinds of things, and that can get like confusing or at least overwhelming when you look at it as a whole.

Emily Lewis: [Agrees]



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Lea Alcantara: But then when I'm writing it down, I just get to the specific tasks.

Emily Lewis: Across it.

Lea Alcantara: Yeah, and then so it feels a lot like calmer and less overwhelming [laughs] to tackle and then I just go through my journal and check off the stuff on paper, and then once I've done that on paper, then I go to Basecamp, double check that it's correlating and then I check it off on Basecamp.

Emily Lewis: And I think this process, even though this technically isn't like a tool or a software, it's a workflow approach. I'm calling it day planning.

Lea Alcantara: Yeah, yeah.

Emily Lewis: And I feel like it does save time.

Lea Alcantara: Oh, absolutely.

Emily Lewis: Because as you mentioned, that you can be really overwhelmed looking at things. Sometimes you'll just send me an email for clarification when you were just looking at Basecamp.

Lea Alcantara: Right.

Emily Lewis: And I think because it had so much detail, you lost the sense of where it fit in with the day.

Lea Alcantara: Yeah, exactly.

Emily Lewis: And so taking this time to look at the list, putting it in order of how you want to tackle them that day, and then moving from that list that's more focused helps you to be more efficient.



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Lea Alcantara: Right. Yeah. Oh, absolutely. I feel like I'm actually tackling the tasks versus just like, "Okay, what's next? What's next?"

Emily Lewis: [Agrees]

Lea Alcantara: And kind of scrambling, you know?

Emily Lewis: [Agrees]

Lea Alcantara: And this one feels a lot more intentional, and I know that there are studies out there that talk about how writing things down helps cognitive function.

Emily Lewis: [Agrees]

Lea Alcantara: And I would say that's totally true for me. It helps me focus a lot more.

Emily Lewis: Yeah. I used to do that. I used to rely on paper, but a couple of years ago, I really intentionally tried to move more digital with my approach, and as you mentioned, I rely on my email inbox for my task management. If you use Basecamp, you know that you get an email notification the day before something is assigned, and so what I do is I let all those things hit my inbox and then once a morning, I do basically what Lea does, except I do it in my inbox and I have a Gmail label called "To-Do" and anything that needs to be done that I received a notification from Basecamp that needs to be done today, it gets to the To-Do label. That moves it up to my priority inbox.

If you use Gmail, you know you have your regular inbox and then you have priority inbox and then you can have another level displayed on your main screens, basically three buckets, and so I move the to-dos to the priority bucket and that's what I focus on for the day and I don't look at anything else



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and then I just repeat that the next day. When I complete something, I open the email notification from Basecamp, click through and close it in Basecamp.

Lea Alcantara: Yeah.

Emily Lewis: So it gets deleted from my inbox.

Lea Alcantara: Yeah, you know what I love about just chatting about this kind of stuff is that there are so many ways to do the same thing.

Emily Lewis: [Agrees]

Lea Alcantara: Like the end tasks is that we check it off at Basecamp.

Emily Lewis: [Agrees]

Lea Alcantara: But we have different ways of parsing the information.

Emily Lewis: So the next thing I thought we could talk a little bit about is our knowledge base.

Lea Alcantara: [Agrees]

Emily Lewis: And it supports our tasks in project management. We don't use Basecamp for it, we use [Google Docs](#) for it, and we'll talk about that a little bit more, about how we use Google Docs more broadly, but from the minute Lea and I joined forces, we realized we had to start documenting how we approach different tasks and we haven't stopped.

Lea Alcantara: Right.

Emily Lewis: And we have a huge knowledge base on Google Docs, and some of them are straight up, you know, a couple of steps, "Do this, this and this," and some of them are very detailed



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documentation like we set up our local projects and get them tied in with version control and [Beanstalk](#), and the thing that I think is critical about the knowledge base for saving time is that, frankly, if you're not documenting what you're doing, it will take you longer the next time you have to do the same thing.

Lea Alcantara: Totally, totally.

Emily Lewis: It just will because you'll have to gather your thoughts, remember what you did. It's really also nice to have a starting document and as your workflow shift and change, you're just updating that document. It's a living knowledge base.

Lea Alcantara: Yeah.

Emily Lewis: Some people use wikis and things like that. Again, the end goal, as long as you're reaching it, it doesn't really matter how you get there.

Lea Alcantara: Right.

Emily Lewis: But creating a knowledge base and using it, looking at it.

Lea Alcantara: Yeah.

Emily Lewis: The next time I ask myself, "Oh, you know, how do I do this?" I always check the knowledge base first just to make sure that we don't already have something documented, and if we don't, that then goes onto the to-do list to make a new document for this new workflow.

Lea Alcantara: Yeah. Oh, absolutely, and even though we're such a small team because I feel like, as we're talking about this, some people might be surprised that we have such extensive



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documentation, but really, when you even just add more person on your team, you need to establish standards.

Emily Lewis: [Agrees]

Lea Alcantara: You need to establish something, otherwise, there's just a lot of chaos, and also even when you do things over and over and over again, you still forget certain steps and having the documentation out there allows you to just have an at-a-glance look over like, okay, if something did go wrong, you're like, "Okay, what step did I miss?"

Emily Lewis: [Agrees]

Lea Alcantara: So for example, like these days, I don't necessarily refer to our version control document anymore because I'm doing that all the time, right?

Emily Lewis: [Agrees]

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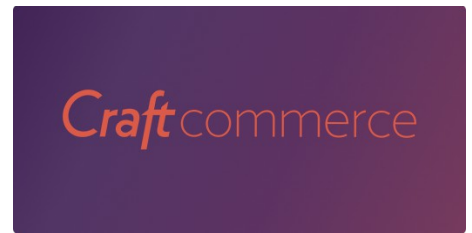
Lea Alcantara: But on occasion, this has happened not that long ago, something goes wrong with version control, and before I panicked and like email you or try to figure all this stuff, usually it is just an error that I did that's already been documented in the workflow.

Emily Lewis: [Agrees]

Lea Alcantara: And because it's documented, I'll be like, "Oh, it's because I forgot this thing."

Emily Lewis: Yeah, yeah.

Lea Alcantara: Yeah.



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Emily Lewis: And it makes it so much faster when you're, like you mentioned, bringing someone not just into your like permanent team, but when we worked with a contractor...

Lea Alcantara: Absolutely.

Emily Lewis: And we want them to be a part of our version control workflow, we don't have a training session. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: We don't have, "Here are all the steps," but we just send them a link to our documentation.

Lea Alcantara: Yeah.

Emily Lewis: The same with, I guess, it was like maybe a year and a half ago, I started using CodeKit instead of Compass.

Lea Alcantara: Right.

Emily Lewis: And while Lea doesn't write the CSS for most of our projects, she does need to have a system set up and so I just handed her the documentation I created.

Lea Alcantara: Yeah.

Emily Lewis: We didn't have to discuss it. She just followed it and it was done.

Lea Alcantara: Yeah.

Emily Lewis: And so it saved a whole lot of time in terms of transferring knowledge and getting people into an existing workflow.



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Lea Alcantara: Yeah, absolutely. Really, documentation, just in general, is a time-saving maneuver for your business.

Emily Lewis: Right, right. All right, so let's talk a little bit about business development, and by that, I mean, getting new work.

Lea Alcantara: Right.

Emily Lewis: Back in the day when we first started...

Lea Alcantara: [Laughs] Back in the day...

Emily Lewis: Or even before you and I joined forces, I was using Word for my proposal generation

Lea Alcantara: Right, yeah, right.

Emily Lewis: If you've used Word, you can imagine how painful that was, especially because Lea and I wanted our proposals to have some flair to it.

Lea Alcantara: Branding.

Emily Lewis: Meaning styles and branding and conveying that we are a creative agency with a lot of design talent, and Word is cumbersome and clumsy and all those things, and then you have to generate a PDF and the PDF never quite looks as sharp as you'd like it to look. [Laughs]

Lea Alcantara: Right.

Emily Lewis: And it took forever.

Lea Alcantara: To customize.

Emily Lewis: I just feel like it took forever.



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Lea Alcantara: Absolutely.

Emily Lewis: God, it took forever, and so last year we tried out this service called [Bidsketch](#). It is intended for proposals and bids, and it's interesting in that you can generate a proposal in it and you can kind of pick and choose sections. You can drag sections up and down, because if you've ever responded to an RFP, you know sometimes they want the information about your company at the beginning of it and sometimes they want the information about the budget in the middle and so moving that stuff around in Word took so much time.

Lea Alcantara: Right.

Emily Lewis: Whereas Bidsketch literally gave us the ability to drag and drop different sections.

Lea Alcantara: Right.

Emily Lewis: It also gave us the nice feature of when someone looked at a proposal, we got a notification that they had looked at it.

Lea Alcantara: Yeah.

Emily Lewis: And if they looked at it more than once, we got that notification as well. It still wasn't as great as we would have liked it to be, like, for example, I spent almost a whole day of truly painful time trying to style Bidsketch.

Lea Alcantara: Right.

Emily Lewis: Because the proposal that's generated is web-based, so when someone gets a proposal from you in Bidsketch, they're going to a web-based interface, and we wanted it to look a certain way, again, to reflect our style and our branding and it took me, no kidding, hours upon hours.



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Lea Alcantara: Right.

Emily Lewis: Because you had to first save an external CS file, then you had to compress it into a ZIP file, then you upload it and then you refresh.

Lea Alcantara: Yeah.

Emily Lewis: So if you wanted to make one change, you had to do those three steps each time. It was miserable. It also became a little cumbersome because as I was mentioning, those sections you can drag and drop, it ended up like with like a 150 different sections, you know?

Lea Alcantara: Right, right.

Emily Lewis: They were all relevant depending on the type of project and we can pick and choose and drag and drop, but we were maintaining all of these different sections and accessing those sections with repagination in Bidsketch, and it always returns you to the beginning of the list after you made a change to a section that was on, let's say, page nine.

Lea Alcantara: Yeah, right.

Emily Lewis: So it just made things a little painful. It was better than Word, but the time saved was not as great as we had hoped it would be.

Lea Alcantara: Right, yeah.

Emily Lewis: And then enter [PandaDoc](#), and I think it was Brandon Kelly at Craft who sent us something in PandaDoc and I was like, "What is this? This is so nice."

Lea Alcantara: Yeah. [Laughs]



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Emily Lewis: It needed our signature, which I guess it's basically for any kind of document that you want to share online, especially if you want it to have some type of signature or approval process, so we started using PandaDoc, and it's been really great.

Lea Alcantara: Yeah.

Emily Lewis: It's super, super fast to edit and customize. The drag and drop feature is still there, and we've extended it beyond just our proposal. So every single contract document that we have, whether it's an NDA or a subcontractor agreement or a retainer or whatever, we've moved it into a PandaDoc template and so now we're using that system for all of our documents that need signatures and approval.

Lea Alcantara: Yeah, and that just makes everything faster too in terms of moving forward.

Emily Lewis: [Agrees]

Lea Alcantara: So for example, we recently put up a proposal for a big project and then once they were ready to move forward, they just signed the digital document and ready to go. It was just so much faster.

Emily Lewis: [Agrees]

Lea Alcantara: It was just so much faster, even seeing them, the notification, I mean, for them to view it. So as a business, that's really important, so you can see kind of gauge the interest because the more they open the document, the more you know they're sharing it and reviewing it.

Emily Lewis: Right. [Agrees]

Lea Alcantara: [Agrees]



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Emily Lewis: Exactly, and then the fact that Bidsketch really was the format of a proposal, but PandaDoc doesn't have any sort of prescribed approach like that.

Lea Alcantara: Right.

Emily Lewis: And so because we can use it for all of our other doc needs, we're no longer using Word for those which save us a lot of time.

Lea Alcantara: Yeah, yeah.

Emily Lewis: And so for the monthly fee that we pay for PandaDoc, and since we're on the annual plan, which breaks out to \$19 a month, any of our contract docs can be handled by that instead of just proposals.

Lea Alcantara: Yeah, and the interface is so much better.

Emily Lewis: Oh yeah, cleaner.

Lea Alcantara: Yeah.

Emily Lewis: It's cleaner.

Lea Alcantara: It's so much better, so much cleaner. It's easier to customize. I mean, it's not like creating-web-pages-from-scratch kind of customization, but it's enough that we can have a nice, clean, simple document that is readable and that the client can parse.

Emily Lewis: I'm pretty pleased that we've made that switch. With Bidsketch, there was always some friction, even though I recognize it was better than Word.

Lea Alcantara: Right.



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Emily Lewis: And I don't feel any friction now with PandaDoc.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: Another tool we're using, and this is a new tool to our arsenal, it's called [Capsule CRM](#). I think CRM stands for "Contact Relationship Management."

Lea Alcantara: Yeah.

Emily Lewis: And Lea, why don't you describe how we used to handle our contacts? [Laughs]

Lea Alcantara: Let's just say how did we handle it is not really handling it. [Laughs]

Emily Lewis: Yeah. [Laughs]

Lea Alcantara: Okay, so for example, we started off when we first joined forces, we're like, "Let's just put everything in a spreadsheet. Like here are our current clients. Here are our prospects," and we just put everything in a spreadsheet, and then somehow along the way, we stopped maintaining that and then we opened up another spreadsheet, completely different with completely different columns and then completely different purpose, and just started shoving people's names in there, and then another year passed or another like business touch point occurred and then we created another spreadsheet and copy pasted it and manually went through the other spreadsheets that I just referenced to be like, "Do we just contact them? I don't know. Did we?"

Emily Lewis: Right. [Laughs]

Lea Alcantara: Then I opened up my mail document and then... anyways, but basically, it was just very, very cumbersome of multiple spreadsheets with multiple different columns and uses and then a



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lot of back and forth of actually manually searching through our own mail apps and documents to kind of cross reference and verify that we actually contacted this person.

Emily Lewis: It was kind of ridiculous, and I think we knew it was ridiculous.

Lea Alcantara: Yeah.

Emily Lewis: But we didn't know what else we were going to do.

Lea Alcantara: Right.

Emily Lewis: Fortunately, our assistant, Erin, did a bunch of research for us last year on different contact management tools and we landed on Capsule. As I mentioned, it's new to our arsenal so we haven't used it fully, but we brought all of our clients into it, not only their contact information, but the major touch points we've had with them over the past couple of years.

It gives us a nice view of what those touch points are in a chronological view and when a person from that client is associated with the client organization record, the organization record pulls in all the notes from all the people in that organization so you can have a high high-level view of the client as an organization or you can drill in to the specific context of that client.

Lea Alcantara: Yeah.

Emily Lewis: We're also using it to make sure that we have all of the different contact information for someone.

Lea Alcantara: Right.

Emily Lewis: With some of our clients, we don't have phone numbers for, which is absolutely ridiculous.



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Lea Alcantara: Yeah.

Emily Lewis: I mean, even though we may rely on email and [Skype](#) for conversations, and that it's not a problem for the client, we should have complete contact information, and Capsule kind of sets us up because it's got the empty field.

Lea Alcantara: Yeah.

Emily Lewis: So when you're creating a new record, you've got to fill in the fields.

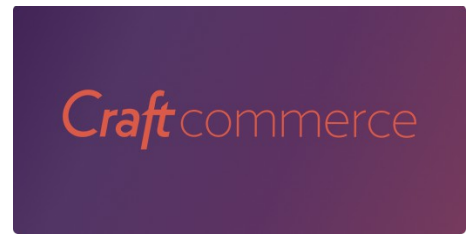
Lea Alcantara: Yeah.

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Emily Lewis: And extending it even further not just like phone numbers and addresses because we do mail our clients things from time to time, but also their social media, particularly LinkedIn and we try and make sure that where we have a professional connection with someone, we connect with them on LinkedIn as well, and Capsule has what they call "tags," and it's just basically a way to tag a record with some kind of information.

For example, when we add a client, we add the client tag that then prompts us to say, "Was this a referral? Who was the referral?" So we are tracking that information. It also helps us tag, for example, we do every year a holiday card that we send out to all of our clients and contacts and making a note who got a card which year. Not a note rather, a tag, we're using tags.

Lea Alcantara: Yeah.



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Emily Lewis: And then from those tags, you can generate lists. So this year when we do our holiday cards, I'll create a list from the tags on last year's holiday cards and I'll automatically know who's getting what and I'll already have all of their mailing information in it.

Lea Alcantara: Yeah, yeah, absolutely, it's insane how we use to do this very, very badly and very manually. [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: Very manually.

Emily Lewis: Yeah.

Lea Alcantara: And this is just scratching the surface of what a CRM is really even capable of.

Emily Lewis: [Agrees]

Lea Alcantara: Right now, we're taking baby steps and just making sure that the contact management part is dealt with, but already we're starting to see certain things that we could use this to help improve our business in other ways, which is just kind of seeing how the sales life cycle is like with a particular client.

Emily Lewis: [Agrees]

Lea Alcantara: And that's not even using all the tools that Capsule CRM gives us. It's just using the "I contacted them at this time and then they responded here. Then we sent them a proposal then and then this is where they signed and this is where they gave us their first deposit." So it gives you like this high-level look over, "Oh, that's how long the sales process took, and that's really important,



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especially when you're trying to plan for marketing efforts and also just realistically understanding how long a sales process takes even, you know?

Emily Lewis: [Agrees]

Lea Alcantara: It just gives a lot of things greater context.

Emily Lewis: And I don't know if when we're going to utilize this functionality, but Capsule even lets you set up – I don't even know what you could call it, so let's say you have a campaign and it starts with an email and then there should be a phone call and then there should be a letter. You can set those things up in Capsule and then once you do the first one, it then triggers the next one.

Lea Alcantara: Right.

Emily Lewis: We haven't figured out if we're going to use that, but it has interesting things like that that we could leverage as we beef up our marketing efforts this year.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: We are using the free plan, but we're probably going to have to go to the Pro plan which is \$12 a month because the free plan is limited to 250 records and we're realizing we have far more than 250 records. [Laughs]

Lea Alcantara: Yeah. That's the thing that shocks me sometimes where really we know that many people. [Laughs]

Emily Lewis: [Laughs] Well, it also illustrates how wasteful we were with the old way.

Lea Alcantara: Right.



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Emily Lewis: Because we were wasting all that time with 250-plus records in spreadsheets that we're all disparate with different information that we never referenced again.

Lea Alcantara: Right.

Emily Lewis: It was ridiculous.

Lea Alcantara: Yeah.

Emily Lewis: So yeah, I'm excited to see how that's going for us. Minimally, it's helping us keep our contact information up to date, and just a quick reference back to both Basecamp to-dos and the knowledge base, when we got Capsule CRM, we created a knowledge base document that talks about how you add a prospect, how do you add a client, how do you add a colleague, how do you tag, and then we also set up to-dos in our to-do list templates for, let's say, when we get a prospect. No matter what happens with the prospect, they get added to our Capsule CRM so that we always know who we talked to, when we talked to, and about what.

Lea Alcantara: Yeah, absolutely, yeah. It's really all about being intentional, right?

Emily Lewis: [Agrees]

Lea Alcantara: Like nothing in business should be just kind of happenstance. It should just all be in a process-based, intentional, reflective and action-based way.

Emily Lewis: Yeah, and this is something we're just learning ourselves right now.

Lea Alcantara: Yeah, right.



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Emily Lewis: This is not like we've known this forever. It's just becoming clearer to us and just to diverge a second from the conversation, I mean, you hear about people shutting their agencies down or struggling to get paid for their work, and Lea and I know that struggle.

Lea Alcantara: [Agrees]

Emily Lewis: We've had some bad years and really scary bad years, but the reality is, is that we're recognizing that it's not like that we can become better at what we do to solve that, we're very good at what we do, but that's not going to solve the problem of running the business.

Lea Alcantara: Yeah.

Emily Lewis: We have to learn more about business.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: We have to understand marketing. We have to understand pricing. We have to understand these fundamental things to running a business, even though we really just want to make great websites and experiences for people.

Lea Alcantara: Yeah.

Emily Lewis: But we can't do that if we're not being intentional with the steps we take in the business.

Lea Alcantara: Yeah, absolutely, and just to take another step back regarding why it's so important to focus on your contact management and why we're even looking at Capsule CRM is that before we were doing things a lot more intentionally, I feel like we're doing a lot of things organically that you should be doing anyway, but we didn't know why, we weren't intentional. There was no kind of plan.



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Emily Lewis: [Agrees]

Lea Alcantara: And we were so bad at keeping in touch with too many people, including clients, including prospects.

Emily Lewis: [Agrees]

Lea Alcantara: And we'd have statements from people who had almost forgotten about us, and that's scary.

Emily Lewis: [Agrees]

Lea Alcantara: That's scary, because you think that you're out there with all these other efforts, like social media or seeing people at conferences and things like that, but if that's all you do, that might not be enough, and also you forget that there are certain people you haven't spoken to in a long time, and you just want to make sure that you are top of mind, and that includes clients, and definitely we're trying to do this much, much better, we never used to contact our clients on a regular basis to get referrals, which is the stupidest thing.

Emily Lewis: [Laughs]

Lea Alcantara: Like honestly, that is probably the stupidest oversight, because they're your clients, they want to refer you, but they've got their jobs, they're doing their own thing, and it's funny because the moment we started reaching out, there are opportunities.

Emily Lewis: [Laughs] There they are.

Lea Alcantara: Exactly, as in like, "Oh, of course, we'll keep you in mind, and yeah, for sure." And the main point is don't assume that people are keeping you in mind, and that's not because you're not



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good at your job or that they wouldn't recommend you. It's that because they've got a life too.

[Laughs]

Emily Lewis: [Agrees]

Lea Alcantara: And it's your job as a business to remind them that you're there.

Emily Lewis: [Agrees]

Lea Alcantara: That you're there to help their business, that you're there to help fill in some gaps in terms of development or design, et cetera and so forth, because if you don't do that, someone else will.

Emily Lewis: Excellent point. So that's pretty much all we're using I feel like for the business development stuff. Obviously, as I mentioned, we're relying on our knowledge base in Basecamp to support those, but PandaDoc and Capsule are pretty much the tools that we are relying on right now exclusively for that.

Lea Alcantara: Absolutely, yeah.

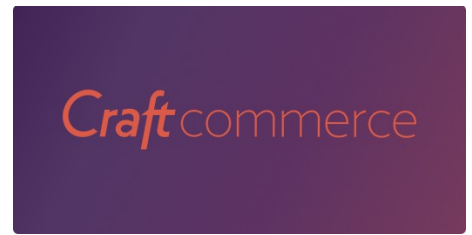
Emily Lewis: So let's talk a little bit about how we collaborate internally and with clients.

Lea Alcantara: Sure. So there are really a couple of main ways beyond Basecamp, and that's chat, sharing your screen or talking over the phone or Skype or a conference call.

Emily Lewis: [Agrees]

Lea Alcantara: So for [chat](#), or let me take a step back, basically with all those different ways, we have to decide when we're going to be using those ways in the first place, right?

Emily Lewis: In the first place, yeah.



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Lea Alcantara: So when we first joined forces, we kind of decided like chat is like if I need your response ASAP and it's a very, very short, simple question.

Emily Lewis: Yeah.

Lea Alcantara: And for that, Emily and I just use like GTalk. We just like kind of hit each other up and be like, "Hey, are you there?"

Emily Lewis: Yeah.

Lea Alcantara: And then after...

Emily Lewis: I actually use Adium if you're a Mac user.

Lea Alcantara: Adium, right.

Emily Lewis: It integrates with GTalk. It's essentially the same.

Lea Alcantara: Yeah, and I just use the messages app which also integrates with GTalk as well as iMessages and things like that as well so that's what I use, and yeah, we use that for anything that's like uncomplicated and just needs a clarification.

Emily Lewis: It's really just internal.

Lea Alcantara: Yeah.

Emily Lewis: I can't think of a single time I've used chat to talk with a client.

Lea Alcantara: No, absolutely not. And then if we do need to talk a little bit more in terms of it's a little bit more complicated or an email can't really explain it or the email is actually getting so long that



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we might as well talk about it, then we ping each other in chat to see if they're there, and then we say, "Are you available for a Skype?"

Emily Lewis: Yeah.

Lea Alcantara: And then we jump on Skype to talk out whatever the discussion needs to be and flush that out, and then the next level after that is if the discussion is even more complicated, then we might want to share screens, and the service that we use for that is Join.me, and it's a free service, which makes things very easy, and then we just share the screen and paste that into Skype. I believe Skype does have a screensharing service too, but we avoid that because I believe you have to pay for it. [Laughs]

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Emily Lewis: And we do this podcast over Skype, we know probably better than most, you can't trust Skype.

Lea Alcantara: Yeah, yeah.

Emily Lewis: [Laughs]

Lea Alcantara: Right, right.

Emily Lewis: Desktop sharing with Skype, while they're handling audio and video, forget about it.

Lea Alcantara: Yeah.

Emily Lewis: You're just going to have a lot of dropping out.

Lea Alcantara: For sure.



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Emily Lewis: That's just what's going to happen.

Lea Alcantara: For sure, and then we've been talking a lot about like our internal communications for our clients, especially when it's going to be more than just me. If Emily and I both need to be on the call plus the client or the prospect, then we use a service called [UberConference](#) and it's a free service as well and you can provide somebody a link or someone with a phone number plus a code and it just makes things pretty easy. We were using a different service before. I forget what it was, and it was just...

Emily Lewis: It was pretty crappy. It was [freeconferencecall.com](#).

Lea Alcantara: Yeah, yeah. It was just really bad, like really unreliable, and that's just unprofessional when you're talking to a prospect and it's just always dropping out. I'm not saying UberConference is perfect. We were just that in UberConference for a different reason, and there were issues there for some reason. I don't know why.

Emily Lewis: [Agrees]

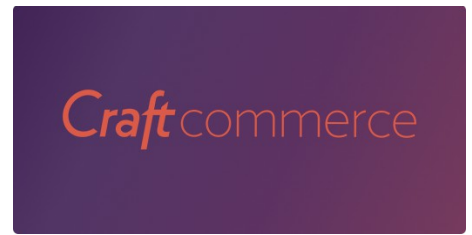
Lea Alcantara: But for our particular client stuff, it hasn't. There really have been little issues, like maybe one dropped call.

Emily Lewis: [Agrees]

Lea Alcantara: But not to the frequency of the other service that we used.

Emily Lewis: Right, the call quality is fairly good.

Lea Alcantara: Yeah.



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Emily Lewis: They also have this, as you're waiting, the music, with this guy singing about "You're waiting on line, waiting for someone to pick up the phone."

Lea Alcantara: [Laughs]

Emily Lewis: It's kind of cute. I think Lea mentioned, we're using the free plan. They do have a paid plan, and we haven't found a need to upgrade yet, but I believe one feature that comes with the paid plan is it record you conversations. It creates a record of that.

Lea Alcantara: Yeah.

Emily Lewis: So which can be useful if you're having a big brainstorming session or something like that or you're offering a consulting service to someone. We did this when we got some coaching from Whitney Hess last year. She used UberConference and it recorded our conversation. We basically got that as an asset after the coaching that we could reference later as a recording.

Lea Alcantara: Yeah, which is pretty good. We kind of do that too on occasion with our kickoff clients.

Emily Lewis: [Agrees]

Lea Alcantara: But we don't use UberConference, we use Skype, and what we're using right now to record the podcast is what we use to record those particular sessions with clients as well.

Emily Lewis: Yeah, Call Recorder. All right, let's jump over to social media. So we have strategic social media plan.

Lea Alcantara: [Agrees]



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Emily Lewis: And part of that involves the three of us, Lea, myself and our assistant Erin gathering information to share on social media.

Lea Alcantara: Right.

Emily Lewis: So essentially, creating a queue of the content we want to promote on Twitter and Facebook and LinkedIn, and so rather than us like posting those in a message in Basecamp or something like that, we found the tool called [Inc.](#) and it allows you to share bookmarks across a team, or links rather for different resources. You can comment on the links. You can organize the links into different groups. For example, there are some links that we share that are strictly for internal reference, and those go in one group, whereas the stuff we're going to share publicly, that is in a separate group.

Lea Alcantara: Yeah.

Emily Lewis: And so it allows all of us to collaborate on the information that we're sharing in a centralized place that's super easy to add to. It comes with a little bookmarklet. So it's a little bookmarklet that adds the link to Inc. and then we can comment on it, and we can even comment to each other specifically, which gives us notifications.

Lea Alcantara: Yeah, absolutely, and you can also use tagging as well.

Emily Lewis: [Agrees]

Lea Alcantara: Right now, we mostly use the hashtag feature not necessarily to search within Inc., which it does and you can do, but we use it to just explain to our assistant like what this hashtag is relevant to.



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Emily Lewis: Yeah, hashtag's relevance.

Lea Alcantara: Or what this subject is mostly about.

Emily Lewis: And you know what, interestingly, and for us, this saves time because our assistant, while she's excellent on our social media, she doesn't know the details about front-end dev or CMS dev or whatever.

Lea Alcantara: Right.

Emily Lewis: And so when we're sharing a link in Inc., the message that we include may be the exact message that we'd like to see be posted to Twitter.

Lea Alcantara: Yeah.

Emily Lewis: To give her the full flavor of how that information should be shared.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: And then further helping us share some time with social media, we rely on [Hootsuite](#). So Erin, our assistant, uses this one. I never go and do it.

Lea Alcantara: Yeah.

Emily Lewis: I couldn't even tell you how she uses it other than to say on Sundays, she goes into Hootsuite and she goes opens up Hootsuite and opens up Inc. and sets up all of the different tweets and Facebook posts and LinkedIn posts that are going to go out that week. She schedules them according to a calendar and I believe we'll be posting an article about this later, about how she does the calendar on our blog.

Lea Alcantara: Right.



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Emily Lewis: But anyways, she's already planned it out for the week, how it's going to go, so there's not like back-to-back things.

Lea Alcantara: Right.

Emily Lewis: So there are some spacing in terms of time, and so that allows her to get everything set up for the week and she just lets it do its thing for the week and she goes in there once a week on Sundays.

Lea Alcantara: Yeah, and it just makes posting semi-automated.

Emily Lewis: [Agrees]

Lea Alcantara: I mean, you still have to craft the tweets, which is manual, but the automation is when it goes out. Before we started using Hootsuite, you and I manually wrote the tweets at the time the tweets were going to be sent out.

Emily Lewis: [Agrees]

Lea Alcantara: And it's just hard when you have so many tweets to send out.

Emily Lewis: Well, and you've got other things on your mind.

Lea Alcantara: Yeah.

Emily Lewis: I mean, you know that a tweet is not the most important thing to do that day.

Lea Alcantara: Yeah.

Emily Lewis: So it's hard to give it the energy and focus that it deserves.

Lea Alcantara: Right.



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Emily Lewis: I think the nice thing about the approach we're doing now is not only is it more automated, it's more strategic. It's more intentional. We have specific to-dos that come up each week for each of us to look for bookmarks to share.

Lea Alcantara: Yeah.

Emily Lewis: And that chunk of time is dedicated to thinking about, "What did we share last week? What's the next podcast coming out? Maybe we should have some content related to that podcast. Oh, we're getting ready to shift our marketing to focus on a specific audience. Let's focus on those kinds of resources."

Lea Alcantara: Right.

Emily Lewis: So it's less ad hoc. It feels much more intentional, much more strategic, and much more holistic.

Lea Alcantara: Right. And I also want to point out that our focus on sharing these resources isn't just to randomly share it in like, "Oh, this is interesting." This is kind of our way to also do our own research because this is a fast-paced industry we're in and unless we have a focused to-do and set aside time to actually see what's going on, it's really easy to miss what's happening, you know?

Emily Lewis: Totally.

Lea Alcantara: Yeah. So...

Emily Lewis: I'm glad you have your pulse on things, because I can't remember the last time I hung out on Twitter. [Laughs]

Lea Alcantara: [Laughs]



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Emily Lewis: Because I just don't have the interest or the focus, but I recognize it's important.

Lea Alcantara: Right.

Emily Lewis: If Lea wasn't, I would be.

Lea Alcantara: Yeah.

Emily Lewis: Because you have to be.

Lea Alcantara: Yeah, absolutely, and I mean, something like Inc. and just even the process of putting all these shared bookmarks together gives us an overall view of what's going on in the industry and what people find important, right?

Emily Lewis: Yeah. And I'll just throw a little other time-saving little tidbit out there. So I don't spend much time on Twitter. I do spend more time on Facebook. I have a little tool. I use a service, just me, myself and I call Pinboard, and that has all of my bookmarks. All the stuff that I reference when I'm building something or whatever, it's not everything that I would share, but when I'm Facebook, and let's say Jeremy Keith posted something interesting, I'll click it in Facebook and then Pinboard lets me just save it and when I have to focus on gathering my bookmarks for Bright Umbrella to share, it's already in a list for me to reference and add to Inc. for us to share broadly. So I'm not spending all my time researching. I've sort of casually saw a few things and flagged them to look at more specifically later.

Lea Alcantara: Right.

Emily Lewis: And I just wanted to mention before we move to the next topic that not only does Hootsuite give us the ability to schedule that stuff in advance. It also gives us some statistics.



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Lea Alcantara: Yeah.

Emily Lewis: And when Erin does our bimonthly reporting on our social media progress, she's pulling from Hootsuite amongst a few other places. All right, let's talk about scheduling. So we really just used [Google Calendar](#) primarily.

Lea Alcantara: Right.

Emily Lewis: Not only scheduling an event with a client and we'll set up an event and send an invite with the conference call information in it, but just also our internal meetings or when I've got a doctor's appointment or Lea is going to take a long weekend, all of that goes into Google Calendar, or the shared Google Calendar that the three of us share.

Lea Alcantara: Yeah, but even that, while it's great, there are ways to make that even better to save time.

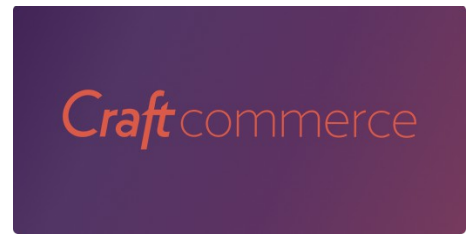
Emily Lewis: Totally.

Lea Alcantara: And so we haven't chosen one yet, but we're looking at a few different ways to automate scheduling for the external meetings, so right now, which is taking us a lot of time. Either Emily or I or our assistant Erin is the one like manually trying to figure out open times to speak to a prospect or a client, and that time adds up.

Emily Lewis: Because it's always like, "Well, can you do 3 o'clock on Thursday?" No. "Okay, well, could you do 2 o'clock on Friday?" Or I can give you five different dates.

Lea Alcantara: Right.

Emily Lewis: And it's always more back and forth than it seems with it.



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Lea Alcantara: Right. So we're looking at something like [Schedule Once](#), [Calendly](#) and [Acuity](#). Those are the three services we're looking at, and the main thing is we want to keep the Google Calendar workflow because we're already set up for that. What we just want is an easy way to send a prospect or client, "Here is the link to one of those services, choose something."

Emily Lewis: Yeah, yeah.

Lea Alcantara: And once they choose something, it just gets shoved into our calendar and then we move on.

Emily Lewis: Yeah.

Lea Alcantara: No, no back and forth here, there, everywhere, plus having to add up all the time zones.

Emily Lewis: Oh. [Laughs]

Lea Alcantara: Yeah, so that like takes up brain space [laughs] and a little bit of anxiety always like figuring out, "Okay, so if I'm available at 1:30 Pacific Time."

Emily Lewis: Oh, and I've messed it up a couple of times, for sure.

Lea Alcantara: Yeah, absolutely, and I mean, the client too, but if it's already in the service where it's synced to your time zone and they see what's open, you don't just say, "Oh, are you available on 1:30 Pacific. That's 2, 3, 4 p.m. Eastern Time." You know? [Laughs]

Emily Lewis: Right. [Laughs]



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Lea Alcantara: So yeah, that's pretty much our next step and I know that a few of our colleagues use one of these services to get things done, and another good thing about this too is it sets expectations. It was actually Ryan Masuga, I don't remember which one he was using. I had to set up a meeting with him and then I was trying to ask him like way ahead of time and stuff, and he told me, part of the reason why he uses one of these services is not necessarily not just to save time with the back and forth and stuff, it's to establish boundaries with clients.

Emily Lewis: Yeah.

Lea Alcantara: So that they're not calling you at all hours of the night or not that they would do that anyway necessarily, but not that they're just willy-nilly contacting you.

Emily Lewis: [Agrees]

Lea Alcantara: And he was telling me and he's like, "Really, I'm not as busy as the schedule makes it look like, but I wanted to establish that I am busy enough that you should respect my time."

Emily Lewis: Yeah, absolutely. Yeah, I couldn't agree more. I know that, oh, and this is just a personal thing, but I hate getting a client call in the middle of the day, and not because there's an emergency, but I'm in the middle of something, and so to get a random call from a client, especially when it's not an emergency just throws everything off my day.

Lea Alcantara: Right.

Emily Lewis: I'm hoping that when we get this available, that we can generally, you know, I think it's one of those things to include in the weekly check-in, and be like, "You know, if you think you might need us this week, don't forget, this is our schedule." You know what I mean?



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Lea Alcantara: Right.

Emily Lewis: So it sets, like you said, those boundaries.

Lea Alcantara: Right.

Emily Lewis: Obviously, if there's an emergency, a client should always call.

Lea Alcantara: Yeah.

Emily Lewis: But for the random, "Oh, I was just thinking about this thing, what do you think about this thing?" And I was like, "Oh, why did I pick up the phone?"

Lea Alcantara: [Laughs]

Emily Lewis: Well, they come in the middle of something. [Laughs]

Lea Alcantara: Well, the other thing too is, you know, one of the things we're trying to do with our business is establish support boundaries as well.

Emily Lewis: [Agrees]

Lea Alcantara: In that if you do want to call in the middle of the day, then you should pay us for priority support, right?

Emily Lewis: Yeah.

Lea Alcantara: Like that's just the bottom line. It's respectful for everyone involved, right?

Emily Lewis: Yeah, exactly.



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Lea Alcantara: Because it just establishes like, “Well, what are the expectations? And if you need us in the middle of the day and you need us to talk to you within the next two hours and drop everything, then that needs to be a paid service.”

Emily Lewis: All right, moving on to stuff like bookkeeping, invoicing and even time tracking, we use [Freshbooks](#).

Lea Alcantara: [Agrees]

Emily Lewis: And when I started this company or started Emily Lewis Design six or seven years ago, I looked at Harvest and something else that I can’t recall. Freshbooks was the one I chose, and then I think, Lea, when you joined, we looked again at something else.

Lea Alcantara: Yeah.

Emily Lewis: And Freshbooks was ultimately what we stuck with.

Lea Alcantara: Yeah.

Emily Lewis: It’s been a big part of managing the business from the financial side. For one, it’s got a nice invoicing feature. Invoices are pretty easy to create, pretty easy to edit and I think one of the nicest things about it is that you can schedule a created invoice to have to send to client a notice if they’re late on paying.

Lea Alcantara: Right.

Emily Lewis: You don’t have to stay on track of that. The system just does.

Lea Alcantara: Yeah.



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Emily Lewis: And you figure out what that time frame is, but yeah, those automatic notifications of late invoices and if it's late, it adds a late fee if you've indicated that she'll get a late fee.

Lea Alcantara: Right.

Emily Lewis: It's just automatic, and I've never actually charged the client the late fee, but when they see that it's been added to their invoice, oh, they get the check to you. [Laughs]

Lea Alcantara: Yeah, yeah. [Laughs]

Emily Lewis: You know, and I'll just delete that late fee because I'm not going to be a dick about it.

Lea Alcantara: Right.

Emily Lewis: But it is available and it offers a little bit more incentive.

Lea Alcantara: Yeah, absolutely, and they also have great easy PayPal integration, and they've got two options. Usually, there's that 2.9% plus whatever 30 cents, and there's this other like PayPal Business payment, so if your client can pay from their PayPal balance, then it's only just the 50-cent transaction.

Emily Lewis: Yeah, which is what we really encourage.

Lea Alcantara: Yeah, which is it just makes things fast, easy and it's just there. Yeah, and it's pretty straightforward, but like the other thing about the invoicing, which it just got released, and you just emailed this to me too, they also have now included bank payments too.

Emily Lewis: Yeah, bank transfers.

Lea Alcantara: Yeah. Well, which comes with a fee based on like the amount of money, but just having more options to make it easier to get paid automatically is great.



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Emily Lewis: Another thing I like about Freshbooks is that we use it for tracking all of our business expenses.

Lea Alcantara: [Agrees]

Emily Lewis: Specifically, the thing I like about it is that you can set up recurring expenses so if you have a software subscription, let's say, Beanstalk, they don't offer an annual plan, it's every month.

Lea Alcantara: Right.

Emily Lewis: I just have it set up recurring. I don't have to log that each month. It just automatically creates itself each month from the day that I say it should be.

Lea Alcantara: Right.

Emily Lewis: And the other thing that is nice about having a single place for all of our expenses and then a bunch of reports that you can run off those expenses is, as we discussed in our conversation with Brad Weaver about pricing, we need to know what our expenses are at every moment in time so that we know what our proper hourly rate should be.

Lea Alcantara: Right, absolutely, and just having and just doing that report allows us to give an overall view over what these expenses are in one place, plus what we're taking in.

Emily Lewis: [Agrees]

Lea Alcantara: Because Freshbooks is what we're taking in with the invoices and then what we're taking out with the expenses, so it's just like one place where you could just develop and export all these reports and then plug it into your pricing spreadsheet as we do.



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Emily Lewis: It's even got a feature where if you work with an accountant, you can give your accountant access and they only see certain things to help with bookkeeping and such, depending on what your needs are. We don't utilize it with our accountant, but it allowed me to get, because I'm the owner of the account and Lea is a user of the account, but Lea couldn't see everything.

Lea Alcantara: Right.

Emily Lewis: She couldn't run all of the reports, but by me making her "our accountant..."

Lea Alcantara: [Laughs]

Emily Lewis: She can now run all of the different reports that she needs to to calculate those hourly rates.

Lea Alcantara: Yeah, absolutely. What I also like with Freshbooks too is that it does really break down all the reports, per client, which one is slower to pay, you know? [Laughs]

Emily Lewis: [Agrees]

Lea Alcantara: Like which ones are more lucrative clients, let's say, because you can even order the billings per month and like per year, all those kinds of things. So Freshbooks just has an easy way to just see all of that in one place, and because it does do invoicing and expenses, unlike, for example, like Harvest or all those other things that might just be single serving, but because this is invoices and expenses, you can see a profit-loss statement so you can really see an idea of how your cash flow is going with your business all in one place.

Emily Lewis: [Agrees]

Lea Alcantara: And I think that really saves a lot of time.



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Emily Lewis: Oh yeah.

Lea Alcantara: Because it's one of the major things when you're considering what kind of services you wanted to deal with. Yeah, there might be these great single-serving services and they could integrate with this, that or the other, but if it's already all in one place and you can parse it easier, then you might as well have it all in one place.

Emily Lewis: It also makes end of the year tax calculation prep easier for me.

Lea Alcantara: Oh yeah.

Emily Lewis: Because all of the expenses are in one place. They all have IRS tax categories applied to them, so I export the report, send it to my accountant and that's it.

Lea Alcantara: Yeah, right.

Emily Lewis: Oh, and I send her a P&L, but she gets all the expenses in a single spreadsheet, and I didn't have to like double check things. It's part of my work flow every month to make sure all the expenses are getting into Freshbooks. That is a manual process, but getting the data out is very easy.

Lea Alcantara: Right.

Emily Lewis: I think it's also worth mentioning, we also use Freshbooks for our time tracking, and on the same vein of making the data easy to extract out, when I have to do monthly payroll, I run the report in Freshbooks, send that to my accountant and payroll is done.

So we also are using or trying to be a little more discreet with our time tracking so that we can see how much time we're spending on social media, how much time we're spending on marketing, how



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much time we're spending on business development. So getting a sense or internally where that time is being spent, and then obviously within a client project, that time tracking is essential for us to estimate future projects.

Lea Alcantara: Oh yeah, absolutely, and whether or not, we're on track with a current project as well.

Emily Lewis: Yeah.

Lea Alcantara: For any of those who are listening right now, like this, what we're talking right now is so integral to pricing your business, it's not even funny.

Emily Lewis: Yeah.

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Lea Alcantara: Like if you can break down your tasks to be as simple and specific as possible, I think that will help you figure out and be more accurate with your pricing instead of just like one giant bucket like, "I'm just working on this client."

Emily Lewis: Yeah.

Lea Alcantara: And it's like, well, what does that mean/

Emily Lewis: Yeah.

Lea Alcantara: What does working on this client mean?

Emily Lewis: [Laughs]

Lea Alcantara: Like am I doing more development? Am I doing Craft work? Am I doing design? And if it's specifically design, am I doing a logo? Like you need to be very, very specific because then



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that gives you an idea over really how much effort and time you're spending on something specific. So when a client asks you for something specific, you can't just say, "Well, I guess it was kind of like this," you know?

Emily Lewis: Right.

Lea Alcantara: And then you lump in project management, which may or may not necessarily be task related, it could just be general related, and that like inflates or makes an inaccurate idea of really how much effort it takes, you know?

Emily Lewis: [Agrees]

Lea Alcantara: Or maybe it is that much effort, right?

Emily Lewis: [Agrees]

Lea Alcantara: But you can't know until you break all the tasks down.

Emily Lewis: And to just tie back to our knowledge base, we have a document that says what our tasks are in Freshbooks and what kind of work is involved in that task and how we should track our notes, and again, it's not something we have to reference all the time because we literally do the time tracking every day.

Lea Alcantara: Right, right.

Emily Lewis: But it's there, and then we recently are working with the marketing consultant and it occurred to me I want marketing and business development to be separate.

Lea Alcantara: Right.



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Emily Lewis: So I can see where we're spending our time so I updated that knowledge base document. I notified Erin and Lea and now we're tracking time separately so that when it comes time for me to see where our time is going, I know that the business development task isn't inflated with marketing work.

Lea Alcantara: Right, right. So we just have a better understanding over what like all those little tasks actually mean, because technically marketing is part of business development.

Emily Lewis: Yeah.

Lea Alcantara: But it makes more sense to track it separately so you really understand when you are doing something towards marketing, how much actually work are we doing...

Emily Lewis: Versus the business development being, "Oh, we're putting together the proposal."

Lea Alcantara: Right.

Emily Lewis: Whereas the marketing is, "Oh, we're crafting this new message for an email we're going to send to a client," or something like that.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: The last tool I wanted to mention in this category of like bookkeeping is [Shoeboxed](#), and this is a pretty awesome tool if you deal with a lot of paper receipts or really anything that you want to create a digital scan of. Right now, we're on the \$9.95 a month plan, but I actually may go down to free because so many more of our receipts are digital these days. But essentially, it's excellent when you go to a conference where you're onsite with a client and there's a lunch receipt and then there's the gas receipt and then there's this, that and the other.



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I don't know if you've ever tried it, but having to scan all those things and then making sure they're cropped right and then saving them properly and then you have to go in and manually enter the expense, it takes time. So Shoeboxed, it's a service where they send you this envelope and you drop in your paper receipts and send it back to them. They scan all of the receipts and as part of scanning, I don't know if it's manual or OCR, but essentially they enter the amount and the date and the vendor, and so your expenses are all basically logged for you from a paper receipt.

I export them once a quarter from Shoeboxed into Freshbooks and I'm not manually entering anything.

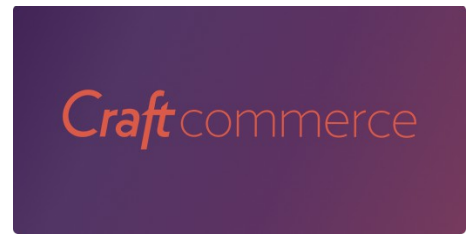
Lea Alcantara: Nice.

Emily Lewis: So like I said, we're using it less just because we have less paper receipts, but when Lea and I went to a conference last June, we had a ton of receipts because Lea and I like to eat out. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: And so I just sent them the big wad of receipts and the business cards and they scanned everything, and the business cards are also very useful so that we didn't have to hand enter all that information. So I really like Shoeboxed. I'm using it less because we don't need to use it as much, but even if we go down to the free plan, I'll still be using it.

Lea Alcantara: Yeah, interesting. Well, for those who are listening that's a freelancer, I just remember the system that I was using before I worked with Emily. It was called [FreeAgent](#), and the reason why I remembered it because if you've got a separate business bank account, so that means the bank account is just a 100% business expenses, what I'd like about FreeAgent was that I could



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just hook up the bank to FreeAgent and so every expense that was listed on this business bank account and business credit card, because that's what's I did with Lealea Design, was just import it and then all I had to do was set up the initial categories and then so every time it updated with the bank, it remembered what the category was before and it just auto did that. So if you're just...

Emily Lewis: Yeah, solo by now.

Lea Alcantara: Yeah, so if you're just a single freelancer, I really highly recommend FreeAgent because that makes things, and that was also my invoicing, I believe as well, tool. For a single person, I definitely think it's very straightforward, and again, you can't make a mistake because this is actual bank statements.

Emily Lewis: [Agrees]

Lea Alcantara: Like regardless of what the paper receipts are, this was actually in your bank. This was actually logged in to your credit card, so it's just pulling those stats and that it organizes it. So if you want a fast, easy way to like auto categorize everything because you've got it, and this only works if you've got a separate bank account, which you should have anyway. Just import all your bank information and it will categorize everything for you.

Emily Lewis: Yeah, I'd love to see something like that come in to Freshbooks.

Lea Alcantara: Yeah, sure.

Emily Lewis: All right, so let's talk a little bit about document and file sharing and we sort of mentioned it before.

Lea Alcantara: Right.



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Emily Lewis: But we're using Dropbox.

Lea Alcantara: Yeah. Dropbox, which is quite essential, I think, for like anything and everything.

Emily Lewis: Oh yeah.

Lea Alcantara: I know that there are other services there like I know that Microsoft and Google Drive obviously exist and there is an Amazon feature and everything, but I feel like the user experience of Dropbox is so superior and it's so brainless because it really feels like you're just working with your file system

Emily Lewis: [Agrees]

Lea Alcantara: Which is what you want.

Emily Lewis: I mean, yeah. Well, for me, Lea, I don't even have a local file system. I mean, I do, it's Dropbox because it's synced.

Lea Alcantara: Yeah, that's what I mean.

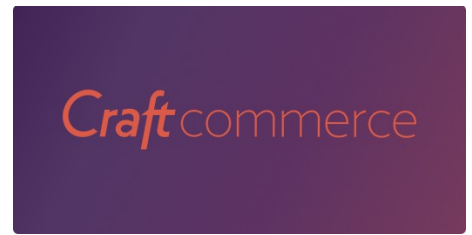
Emily Lewis: But like on my Mac, I don't have anything under Documents.

Lea Alcantara: Right.

Emily Lewis: I have it all under Dropbox because that just make sense, including all my personal stuff.

Lea Alcantara: Yeah, me too.

Emily Lewis: So Bright Umbrella has an account, and oh I don't even remember how we set it up. But anyway, I think we're both pulling off of that account for the storage space.



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Lea Alcantara: Yes, right.

Emily Lewis: Or rather all three of us are.

Lea Alcantara: Yeah.

Emily Lewis: But even though we have shared directories in that account, I also have my own private stuff.

Lea Alcantara: Yeah, me too.

Emily Lewis: And it's all in Dropbox, which makes it so nice when I'm working on my laptop one day and then the other day I'm working on my desktop computer because they both have that Dropbox folder synced to those systems.

Lea Alcantara: Oh, I totally agree, and even on your phone for certain things, like when I first...

Emily Lewis: Yeah, yes.

Lea Alcantara: To like when I first moved to the United States, like I have a personal Dropbox folder just called "Seattle," and I just shoved in all the important documents on there so I could just like easily reference a bunch of PDFs and things that I needed right away when you're talking to, like when you have to talk to someone, a bank or whatever, if it's like all hidden in various emails or who knows where, like Dropbox having it all in one repository and I don't have to take out my laptop, that it's just in my phone, that makes things like super, super easy beyond just being able to switch from my iMac to my Macbook and vice versa.



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Emily Lewis: Oh, totally. I used it for my 2015 tax prep. I created a Dropbox folder between me and my accountant and every time I got a 1099 from someone or I got my mortgage interest statement or whatever, I just dropped it into there.

Lea Alcantara: Yeah.

Emily Lewis: So there was just one place that she could go to for all of those files rather than me attaching them to an email that might clog up because it's so big or whatever.

Lea Alcantara: Right, right, and I believe Dropbox also has like a new feature where you can actually send somebody a folder. This is different from creating a folder and then sharing a folder. This is like more of the temporary one when we do our podcast and we have a guest.

Emily Lewis: [Agrees]

Lea Alcantara: And for whatever reason, they don't have Dropbox. There are people who don't have them. [Laughs]

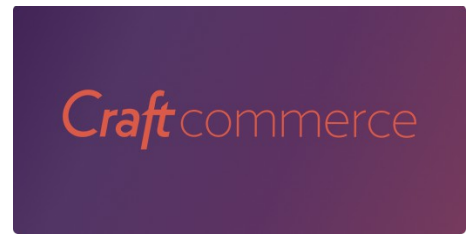
Emily Lewis: [Laughs]

Lea Alcantara: But we usually get our guests to put the recorded file onto Dropbox, but if they don't have one, Dropbox gives you an opportunity to open up some particular folder and have them just drop it in there somehow, and it works.

Emily Lewis: [Agrees]

Lea Alcantara: It just works. I just feel like that's why we use Dropbox, like some people could say, "Why don't you use Google Drive? It's free," and all of this, it's just cumbersome.

Emily Lewis: [Agrees]



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Lea Alcantara: It's cumbersome. It doesn't have the same user experience as Dropbox.

Emily Lewis: Right.

Lea Alcantara: And that's why we paid for it. That's what we're paying for it.

Emily Lewis: Great. If I go to the Dropbox folder on my computer and go to a file, I can right click on it and grab the Dropbox share link just right there.

Lea Alcantara: Oh, yeah.

Emily Lewis: I love that feature.

Lea Alcantara: I know, totally, and because you and I are synced on Dropbox with our Bright Umbrella files, sometimes I can tell when you're working. [Laughs]

Emily Lewis: Yeah. [Laughs]

Lea Alcantara: Because I see like file is updated and like I'm not working on anything and if I see file is updated, "Oh, Emily is doing some work." [Laughs]

Emily Lewis: Yes, so Dropbox has been a good decision. That said, we still utilize Google Docs.

Lea Alcantara: Yes, the documents, yeah.

Emily Lewis: Yeah. So Dropbox is kind of like we keep PDFs there, image files...

Lea Alcantara: PSDs, like basically, yeah.

Emily Lewis: PSDs.

Lea Alcantara: Contacts.



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Emily Lewis: Like files that you wouldn't necessarily want to collaborate on necessarily.

Lea Alcantara: Yeah.

Emily Lewis: But things that you do want to perhaps share.

Lea Alcantara: Right.

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Emily Lewis: Whereas Google Docs, we use that more for the collaboration aspect.

Lea Alcantara: Absolutely.

Emily Lewis: And not just internal, but also client documents, like anytime we build a CMS for someone, they get a user manual and it's on Google Docs.

Lea Alcantara: Yeah.

Emily Lewis: We create it in Google Docs. One of the reasons we do that is we love the shared collaboration. We love the ability to comment and respond to comments, and it does give us the ability to restrict access.

Lea Alcantara: Right.

Emily Lewis: So it's not just out in the ether, you can set security so it's only for either us internally or specific client email addresses.

Lea Alcantara: Right.

Emily Lewis: So yeah, we have a ton of it. Our knowledge base is on Google Docs, like I mentioned earlier.



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Lea Alcantara: Yeah.

Emily Lewis: But yeah, we use that for everything that we're collaborating on. When we have an agenda for a meeting, we've got a shared Google Doc and Lea and I are both typing in it while we're talking to the client.

Lea Alcantara: Right.

Emily Lewis: We use it for our internal check-ins, yeah, with everything.

Lea Alcantara: Yeah, it's interesting that because we're such sticklers for documentation, there's just so much, so much to do with the business, you know?

Emily Lewis: [Agrees]

Lea Alcantara: Like here's an inquiry for this, here's an inquiry for that. It's kind of like now that were a lot more intentional, it was shocking at first for me to even think we had over 250 contacts.

Emily Lewis: [Agrees]

Lea Alcantara: But when I'm looking at this knowledge base in this Google Docs and I'm like, "Well, look at all the projects and people we had to deal with in even one project."

Emily Lewis: [Agrees]

Lea Alcantara: Yeah, of course, that's why all our contacts ended up being over 250, and all the notes that we do for like our meetings and check-ins, it's just all add up.

Emily Lewis: So I do have Google Drive set up on both of my computers similarly to Dropbox where it's syncing to my local system, and I'm only doing that as like what if something would have happen. I've actually never worked from that.



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Lea Alcantara: Right.

Emily Lewis: But it's there. Erin, our assistant, does. She uses Google Drive from her computer more than she does going to Google Drive from the web.

Lea Alcantara: Yeah.

Emily Lewis: It's kind of like what we're talking about in the beginning. The end goal, the end result is the same, but how we get there is different, and you really kind of have to pick the one that works with the way you work.

Lea Alcantara: Yeah. As long as there's like an agreed upon endpoint.

Emily Lewis: Right, exactly [Laughs]

Lea Alcantara: And the end...

Emily Lewis: The end result has to be the same.

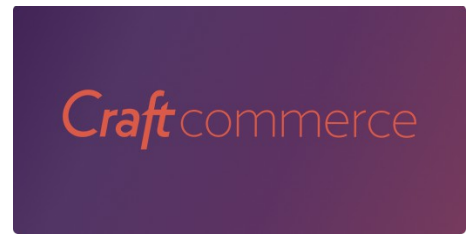
Lea Alcantara: Yeah, yeah, and that's just like exactly the client work, like I don't want you or Erin or me to be prescriptive over how exactly we're going to get to the endpoint, whether it's project management or even client work as long as the endpoint gets there.

Emily Lewis: So thus far, pretty much everything we've shared could be applied to any kind of business.

Lea Alcantara: Yeah.

Emily Lewis: Any kind of business.

Lea Alcantara: Yeah, absolutely.



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Emily Lewis: Whether you're an accounting firm or a law firm or whatever.

Lea Alcantara: Right.

Emily Lewis: These last two tools I want to mention, they're really mostly for people like us who do web design and development, and I do feel that these save us time.

Lea Alcantara: Yeah.

Emily Lewis: For example, we use Beanstalk for version control. It's a centralized version control rather than, I think the alternative would be like [GitHub](#) or something or something like that.

Lea Alcantara: Yeah, yeah, yeah. There are a bunch of other different possibilities.

Emily Lewis: Beanstalk is really easy for me to use. I do tend to get intimidated with command line things and stuff that just doesn't work with my internal vocabulary.

Lea Alcantara: Right, right.

Emily Lewis: And Beanstalk does.

Lea Alcantara: Right.

Emily Lewis: And it's also what our friend, Ian Pitts, who taught us about version control. It's what he utilizes and so he walked us through it and which also helped us get familiar with it.

Lea Alcantara: Right.

Emily Lewis: I think what I like most about it today now that we use it all the time is that it's kind of invisible.

Lea Alcantara: Right.



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Emily Lewis: We don't see it. We don't do much with it. It's just integrated into everything and it's creating this central version control, and then if we bring on a subcontractor or we need some help, and I think once we needed some help from Pixel & Tonic on a Craft project.

Lea Alcantara: Yeah, right.

Emily Lewis: We just add them to the repository in Beanstalk and they have access to it. They don't have to use Tower like we do.

Lea Alcantara: Yeah.

Emily Lewis: They can use whatever they want for version control as long as they're tied to the Beanstalk repository.

Lea Alcantara: Yeah, it just makes it so, so easy. So if you do have that type of mindset where maybe command line isn't for you, but even if the command line isn't for you, it's just this does this so easy.

Emily Lewis: [Agrees]

Lea Alcantara: It's just so easy, so step by step. User interface is straightforward, easy integration to Tower, it's just brainless, like the less you have to think about it, the faster you can be in going back to your work, doing the stuff that you want to get done.

Emily Lewis: Yeah, exactly.

Lea Alcantara: Yeah.

Emily Lewis: Exactly.



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Lea Alcantara: And of course, just in general, beyond just saving time, like saving your ass for making a ton of mistakes. [Laughs]

Emily Lewis: Totally. [Laughs]

Lea Alcantara: Which is just an inevitability, the longer a project happens, and so on and so forth.

Emily Lewis: [Agrees]

Lea Alcantara: Just having a system like Beanstalk easily rolling back or being able to see at a glance how often things have been committed to it, et cetera.

Emily Lewis: [Agrees]

Lea Alcantara: It just makes it faster to troubleshoot.

Emily Lewis: So this last tool I'm going to mention that might ruffle some feathers, but I don't really care. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: So we pay for an annual subscription to [Browserstack](#). If you've not heard of Browserstack, it's a web-based service that provides emulators as well as real access to devices and browsers. So if you want to test on an iPhone 5S or you want to test out on an IE5, Browserstack either has an emulator or an actual device that you can connect to into your testing.

Lea Alcantara: Yeah.

Emily Lewis: I firmly, firmly believe that when you were doing a testing, whether it's mobile or desktop or both, you should always test on the real device. You should always. If you have that device, test on it.



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Lea Alcantara: If you have that device.

Emily Lewis: Exactly. But I don't have all of the devices. I mean, even amongst the three of us, Lea, myself and Erin, we don't have all the devices, and frankly, Bright Umbrella is not in a position where we can make that kind of investment in devices.

Lea Alcantara: Right.

Emily Lewis: If we got some huge ass project with an amazing budget, I would create device lab.

Lea Alcantara: Sure.

Emily Lewis: But that hasn't happened and that's not where we are, and frankly, when I'm doing development, I don't have the luxury of time to be like, "Oh, I'm going to go up to the Verizon store and check out my sites on the phones there.

Lea Alcantara: Right. [Laughs]

Emily Lewis: Because that's what people say to do, and I find that so unrealistic.

Lea Alcantara: Right.

Emily Lewis: Sure, if you have a ton of extra time in your project, but who does?

Lea Alcantara: Right.

Emily Lewis: I don't know who's got that extra time.

Lea Alcantara: Right.

Emily Lewis: Because then you'd have to not only go to the Verizon store, but then you've got to go to the Apple Store and it's simply not realistic.



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Lea Alcantara: Right, right, and at some point, those retail guys are going to get suspicious over this lady looking over these phones for several hours. [Laughs]

Emily Lewis: I mean, I do encourage that if you are an upgrader, that you keep your old devices. I've got my own set of old devices and I have my partner Jason save his old devices as well. But the reality is that we can't test on everything.

Lea Alcantara: Yeah.

Emily Lewis: On everything that's real.

Lea Alcantara: Right.

Emily Lewis: And so we use Browserstack. It's to supplement our testing, but also I use it when I'm developing. When I'm not ready to do the actual testing, but I'm just doing a little bit of testing, and so what I mean by that is like everything is not done and it's not ready to hand over for Lea to do her testing or to have Erin to do her testing, but I'm just checking out like a little part of a page.

Lea Alcantara: Right.

Emily Lewis: I'll open Browserstack and I'll just see what's happening in different areas. I find it very useful for production.

Lea Alcantara: Yeah.

Emily Lewis: I find it very useful to cover as many bases as we can in testing, and I will not apologize for it. I cannot stand the purist who are like, "Oh no, you must test on every device." It's simply not realistic.



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Lea Alcantara: Well, I mean, I feel like, speaking about just business stuff, there are realities that certain people I'm not sure are in tune with, that there are different types of budgets and clients and businesses.

Emily Lewis: [Agrees]

Lea Alcantara: Like not everybody can get a six-figure client with that type of budget just for the testing, you know?

Emily Lewis: Right.

Lea Alcantara: And then at the same time, Browserstack is a pretty good testing tool.

Emily Lewis: [Agrees]

Lea Alcantara: Obviously, it's never as good as the real thing because obviously there's the real thing, but even when you have the real thing, like we cannot test every single iteration of iOS on every single iPhone that's ever existed.

Emily Lewis: [Agrees]

Lea Alcantara: That's just ridiculous, but you can do that on Browserstack.

Emily Lewis: Yeah.

Lea Alcantara: If you wanted to, if you wanted to test iPhone 5 from the oldest OS like for some reason it never upgraded to the latest one, then that's available to you there.

Emily Lewis: [Agrees]



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Lea Alcantara: But let's say you even have a physical iPhone 5 or an iPhone 4 or like a Samsung Galaxy, an old one, it will be frozen in time from the last time you updated it.

Emily Lewis: [Agrees]

Lea Alcantara: And that may or may not necessarily be relevant to your testing.

Emily Lewis: Yeah.

Lea Alcantara: And this is just like a total probably other podcast about like at some point you need to draw a line with your testing, you know?

Emily Lewis: I agree, and again, in case it wasn't clear when I said that I'm doing production using Browserstack, that means it lets you look at local sites.

Lea Alcantara: [Agrees]

Emily Lewis: I can't look at a local production at the Verizon store unless I've got some other tools that I'm paying for that creates – what are those called like temporary URLs or whatever?

Lea Alcantara: Yeah, yeah, yeah. It just opens up your – I don't know their technical term.

Emily Lewis: But like a virtual host of some kind or anything like that.

Lea Alcantara: Yeah, yeah, yeah. There you go.

Emily Lewis: But yeah, so I'm a huge fan of Browserstack. It is not only our tool for testing, but it is important tool in our testing, and I would recommend it to anyone who asks me without hesitation.

Lea Alcantara: Yeah, absolutely, absolutely.

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Emily Lewis: So I want to kind of conclude our discussion a little bit about money.

Lea Alcantara: [Agrees]

Emily Lewis: So we've talked about a lot of tools. I'd say at least 50% of what we've mentioned is free.

Lea Alcantara: Yeah.

Emily Lewis: The other 50% we pay for.

Lea Alcantara: Yeah.

Emily Lewis: I did a quick calculation before the podcast today. On average, we spend about \$2,114 a year on these services.

Lea Alcantara: Yeah.

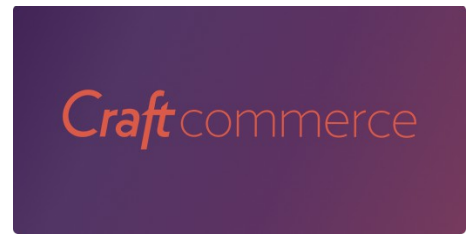
Emily Lewis: Where I can, I have us do the annual plans because that usually saves you 10 to 50 cents a month where we can. We pay monthly, but honestly, while that is not a small amount of money, if I were to add up the hours that Lea, myself and Erin would spend doing any of this stuff manually, it would be ten times that amount.

Lea Alcantara: Right.

Emily Lewis: Maybe not ten, five times that amount, like \$10,000 maybe.

Lea Alcantara: Right, right, and I mean, at the end of the day, time is money.

Emily Lewis: [Agrees]



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Lea Alcantara: If you are spending all that time to running your business that you don't need to, then that's time you're spending not earning billable hours, you know?

Emily Lewis: Exactly.

Lea Alcantara: So it's kind of like the cost analysis, the pro/con type of thing.

Emily Lewis: [Agrees]

Lea Alcantara: And at the end of the day when you divide \$2,114 by 12, that's about \$176 a month, and hopefully you should be earning more than that to cover running your business.

Emily Lewis: And the great thing about these services other than the service they provide is that all of the ones that I've mentioned, they're – what's that called – like Software as a Service.

Lea Alcantara: Right.

Emily Lewis: So you can change your subscription. You can go up, you can go down, and even if you've done the annual plan, they let you go up and down within that. It's very easy to change plans. I've done that with almost everything we've mentioned. We've gone either up or down. We've gone from monthly to annual, and it's not been difficult at all.

Lea Alcantara: Yeah.

Emily Lewis: So it's flexible to what the business needs.

Lea Alcantara: Yeah, absolutely, and even when we were shifting like, for example, the proposal services we're using from like Bidsketch to PandaDoc, especially if they're competitive systems, they tend to be pricing themselves very similarly.

Emily Lewis: [Agrees]



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Lea Alcantara: So if you're in a subscription model, moving from one to the other is relatively painless in that at least like status quo in terms of expenses, it stays more or less the same, although, of course, there's still setup and things like that whenever you start something new, but generally speaking, subscription models, depending on what the services are, they tend to have similar pricing points.

Emily Lewis: Yeah.

Lea Alcantara: A variety that ends up being the same.

Emily Lewis: So when I added all this up, this is the first time I actually added up what we spend for a year, frankly, I was presently surprised.

Lea Alcantara: [Laughs]

Emily Lewis: I was like, "Oh, it's only \$2,000." I thought it would be more, and I think the reason I thought it would be more is we get a lot from it.

Lea Alcantara: Yeah.

Emily Lewis: We get a lot of value from the services we pay for.

Lea Alcantara: Yeah, absolutely.

Emily Lewis: And so \$2,000, I'm like, "Wow, that's so worth it." It's so worth it for where we are today.

Lea Alcantara: Yeah, absolutely. But what's important though, and I think what I want to end with when we're talking about all these tools, is you should have a time to set aside to review what you're doing. So for example, we set aside time to review the Bidsketch, all that stuff that was annoying.



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We didn't just grind through it and we're like, "This is it." We set aside time to do research to see what else is out there.

Emily Lewis: [Agrees]

Lea Alcantara: Because, again, anything that makes your business life a headache, why deal with that and figure all those types of things out, and the other thing too is, even though we do find all this value over all these services and we're willing to pay, be critical over which ones you're paying for as well.

Emily Lewis: [Agrees]

Lea Alcantara: Like if this is really \$44 a month, is it worth that \$44 a month? Definitely for Freshbooks, it makes sense.

Emily Lewis: [Agrees]

Lea Alcantara: It's our primary financial hub there, but is that what we want for like a to-do app? Maybe not, you know? [Laughs]

Emily Lewis: [Agrees]

Lea Alcantara: Just be reflective over where you're spending and wasting your time and your money.

Emily Lewis: Yeah, agreed.

Lea Alcantara: Anyway, I feel like this would be a good episode to share for anyone who asks like, "How does Bright Umbrella run its business?"

Emily Lewis: Exactly.



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Lea Alcantara: And hopefully, people get a lot out of this and speed up their business.

Emily Lewis: Just some ideas about some of the services that are out there and how they can apply them to their own business.

Lea Alcantara: For sure, but before we finish up, we've got our Rapid Fire Ten Questions, so our listeners can get to know us a bit better, and since it's just Emily and I, Emily lost the coin toss.

Emily Lewis: [Laughs]

Lea Alcantara: And she's going to be answering the questions this time around.

Emily Lewis: Okay.

Lea Alcantara: So are you ready, Emily?

Emily Lewis: Yeah, I'm not at all prepared. You jumped me.

Lea Alcantara: [Laughs]

Emily Lewis: There's no coin toss. Lea just decided. [Laughs]

Lea Alcantara: No, I did. I was the coin toss. [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: Okay, so first question, morning person or night owl?

Emily Lewis: I don't stay up late anymore, but I am not pleasant in the morning.

Lea Alcantara: [Laughs]



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Emily Lewis: So I don't really know the answer to that question. [Laughs] I get up as early as I can because I like to attack the day.

Lea Alcantara: Right.

Emily Lewis: So I guess I'm a morning person, but I'm not the kind that you want to talk to.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: I love that.

Emily Lewis: Until like noon or something like that. [Laughs]

Lea Alcantara: That's funny. So what's one of your guilty pleasures?

Emily Lewis: I have so many of them. I'm definitely I guess, oh okay, so I really like watching *Grey's Anatomy* with red wine.

Lea Alcantara: [Laughs]

Emily Lewis: Like I almost don't watch an episode unless I have booze in my hand. So it's *Grey's Anatomy* and some kind of cocktail or wine or something.

Lea Alcantara: Oh, my gosh, that's too funny. Oh, Shonda Rhimes.

Emily Lewis: [Laughs]

Lea Alcantara: What software could you not live without?

Emily Lewis: This one is hard because I'm not the kind of person that's like, "Oh, I love this software." But I was thinking about it, I'd say Gmail.



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Lea Alcantara: Right.

Emily Lewis: Because I use it for managing my tasks, in communication, and I keep receipts in there, like all my electronic receipts.

Lea Alcantara: Right.

Emily Lewis: So yeah, Gmail.

Lea Alcantara: What profession other than your own would you like to try?

Emily Lewis: Gosh, yeah, I can't think of anything new that I've not thought of before.

Lea Alcantara: You've done a lot. You've had several careers.

Emily Lewis: Yes, I have. Oh, I really enjoyed cake decorating. That would be fun to do again.

Lea Alcantara: Oh, very cool.

Emily Lewis: That was fun.

Lea Alcantara: So what profession would you not like to try?

Emily Lewis: Yeah, I'm sure I answered this one before, but yeah, anything with money or numbers, accounting, I just get completely overwhelmed.

Lea Alcantara: If you could take us to one restaurant in your town, where would we go?

Emily Lewis: [Jennifer James 101](#).

Lea Alcantara: Oh.



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Emily Lewis: It's probably best described as the super trendy term farm-to-table kind of thing American bistro, but she's a James Beard award-winning chef and it's always where Jason and I go when they have a special occasion. They have amazing foie gras there, which is appetizing.

Lea Alcantara: Oh, my gosh, yum.

Emily Lewis: The menu is always changing.

Lea Alcantara: If you could meet someone famous, living or dead, who would it be?

Emily Lewis: So this one I will pick someone, but I will first tell you guys that I have a list that I have been keeping for a couple of years and I call it the "dinner party" list of all the people that I would really like to be at a dinner party with me.

Lea Alcantara: Oh my God, I love it.

Emily Lewis: So the very first person that was on this list, and this is who I'll say is Ellen DeGeneres.

Lea Alcantara: Oh, lovely, she's awesome.

Emily Lewis: Oh yeah. I feel like you can't just pick one person. You'd want to have a dinner party.

Lea Alcantara: Dinner party, sure.

Emily Lewis: And have everyone engaged in everything.

Lea Alcantara: For sure. If you could have a super power, what would it would be?

Emily Lewis: Yeah, I'm going to have to go with my last answer. I feel strongly that I'd like to go from one place to another instantly, whatever that's called.

Lea Alcantara: Teleportation.



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Emily Lewis: Teleportation, that's right.

Lea Alcantara: What is your favorite band or musician?

Emily Lewis: Oh, such a hard question, but my whole, as far as I can remember being really into music, I've love Steely Dan.

Lea Alcantara: Nice.

Emily Lewis: So if you grew up in the 70's, you know what I'm talking about.

Lea Alcantara: Finally, pancakes or waffles?

Emily Lewis: Pancakes with lots of butter. [Laughs]

Lea Alcantara: Yum, yum.

Emily Lewis: I actually hate waffles.

Lea Alcantara: Oh wow, wow.

Emily Lewis: I do not like waffles.

Lea Alcantara: Strong stance, strong stance.

Emily Lewis: I do not like them. Oh, I like waffle cones.

Lea Alcantara: That's different though.

Emily Lewis: [Laughs]

Lea Alcantara: Because it's crispy and there's ice cream involved.

Emily Lewis: Right, exactly.



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Lea Alcantara: All right, so that's all the time we have for today. Hopefully, what we shared will help you be more efficient in your business.

Emily Lewis: And if you have any tools or tips you'd like to share on saving time on your business, please send it to us. We're always open to more resources.

Lea Alcantara: Absolutely.

[Music starts]

Lea Alcantara: CTRL+CLICK is produced by [Bright Umbrella](#), a web services agency obsessed with happy clients. Today's podcast would not be possible without the support of this episode's sponsor! Thank you, [Craft Commerce](#)!

Emily Lewis: We'd also like to thank our partners: [Arcustech](#) and [Devot:ee](#).

Lea Alcantara: And thanks to our listeners for tuning in! If you want to know more about CTRL+CLICK, make sure you follow us on Twitter [@ctrlclickcast](#) or visit our website, [ctrlclickcast.com](#). And if you liked this episode, please give us a review on [iTunes](#), [Stitcher](#) or both! And if you really liked this episode, consider donating to the show. Links are in our show notes and on our site.

Emily Lewis: Don't forget to tune in to our next episode when we have another returning guest. Our friend, Eric Lamb, will be joining us to talk about platform-agnostic add-on development. Be sure to check out our schedule on our site, [ctrlclickcast.com/schedule](#) for other upcoming topics.

Lea Alcantara: This is Lea Alcantara ...

Emily Lewis: And Emily Lewis ...



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Lea Alcantara: Signing off for CTRL+CLICK CAST. See you next time!

Emily Lewis: Cheers!

[Music stops]

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