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## CTRL+CLICK CAST #126

### Dealing with Business Challenges

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**Preview:** How do you know things are going wrong without reflecting, and how do you know things are going right without even defining what success means?

[Music]

**Lea Alcantara:** From [Bright Umbrella](#), this is CTRL+CLICK CAST! We inspect the web for you! I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

**Emily Lewis:** Emily Lewis!

**Lea Alcantara:** Today's episode is sponsored by [Foster Made](#), a digital design and development agency committed to creating thoughtful solutions to your technology challenges. From smart user experiences to strategic programming, Foster Made employs technology as a medium for advancing your business and making human connections. Visit [fostermade.co](https://fostermade.co) to learn more.

[Music ends]

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**Emily Lewis:** Before we get to today's episode, I wanted to remind our listeners that we launched a [Patreon](#) last month.

**Lea Alcantara:** Whohoo!

**Emily Lewis:** [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** The money we earn, we hope, will help us experiment with the new format and content without sacrificing the foundation of what we built over the past eight years. We also want to connect more with our listeners, so we create a content you want.

**Lea Alcantara:** And our patrons get a bunch of sweet rewards.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Like early access to new episodes, a private Slack to discuss these episodes and even one-on-ones with one or both of us. We've got something for everyone. Just visit [patreon.com/ctrlclickcast](https://patreon.com/ctrlclickcast) to learn more and then pick a tier.

**Emily Lewis:** For our topic today, we were going to talk to Rachel Nabors about web animation, but she has the flu.

**Lea Alcantara:** Oh.

**Emily Lewis:** And due to our end of the year schedule, we won't be able to get her back in to our schedule until 2019, but we promise we will. [Laughs]

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**Lea Alcantara:** So instead, Em and I are going to talk about business challenges.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Specifically, *our* business challenges.

**Emily Lewis:** Yeah, this is going to be an interesting episode. [Laughs]

**Lea Alcantara:** [Agrees] [Laughs]

**Emily Lewis:** It's been, honestly, a difficult year for Bright Umbrella. We lost our biggest client. Leads and opportunities have been really slow.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** And most of those we've gotten we haven't been able to convert to a sale. In fact, it's been hard to get sponsors for the show. We also had challenges on our partnership, struggling with accountability and finding a fair balance of who does what and how.

**Lea Alcantara:** But this isn't the first time we've had challenges.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So we're trying different things and making changes to our processes in hopes that 2019 will be a better year.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** And we'll share some of that with our listeners. Maybe some of you are having your own struggles.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And just maybe some of what we're trying could work for you.

**Emily Lewis:** Yeah. And I think we've mentioned this on the show a couple of times, but people don't talk about the bad stuff so much.

**Lea Alcantara:** Yeah.

**Emily Lewis:** You hear a lot about success and how someone had a killer year, but you don't hear a lot about when things aren't going well, and I don't think that's good.

**Lea Alcantara:** No.

**Emily Lewis:** I think it's important to talk about this stuff. You and I certainly do it in our business.

**Lea Alcantara:** Right.

**Emily Lewis:** And I think it's important to hear others talk about it. For one, you don't feel alone.

**Lea Alcantara:** Yeah.

**Emily Lewis:** But for two, you might have actually find some new way to think about it that helps you resolve or move through the problem, and so I think that's one of the reasons why we want to kind of have this real talk episode about what's got on in our business this year.

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**Lea Alcantara:** Yeah, absolutely, and also to normalize it, right?

**Emily Lewis:** Totally.

**Lea Alcantara:** So...

**Emily Lewis:** Because it is.

**Lea Alcantara:** Yeah, we're not the only ones dealing with this stuff. [Laughs]

**Emily Lewis:** Exactly. So we wanted to start with our partnership challenges. When I was kind of jotting these thoughts down, Lea, I thought it was so ironic that we started the year doing a presentation for Owner Summit about healthy partnerships and communication.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And yet, just a few months after that presentation, you and I were really struggling in our partnership, and it's probably been – I don't know – I think it's our greatest challenge this year.

**Lea Alcantara:** Yeah, I would say that's true, and I think it's one of those things where just because you know what to do or the tools or even can see what the challenges are, actually putting things in place when people are involved and money is involved and the business is involved, it's a lot easier said than done.

**Emily Lewis:** [Agrees] So we're not going to share everything today. [Laughs]

**Lea Alcantara:** [Laughs]

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**Emily Lewis:** It's not everybody's business, but I'm thinking that some of the things we've outlined to talk about today might show up in other people's businesses, and even if you're not running a business, maybe this shows up in a team or you're working for someone else.

**Lea Alcantara:** Right.

**Emily Lewis:** I could see all of these things coming up. So one of the challenges that we had, and frankly, I think we've had this challenge longer than this year. I think this year it just came to a head.

**Lea Alcantara:** Yeah, right.

**Emily Lewis:** It's that you and I have really, what we thought, was good communication and we would have a check in every week or every other week rather where we kind of how are things going, what new needs to be done.

**Lea Alcantara:** Yeah, right.

**Emily Lewis:** And we identified tasks during that discussion every two weeks of what needs to move forward next.

**Lea Alcantara:** Right.

**Emily Lewis:** And so we get those into the queue. For example, redesigning the CTRL+CLICK CAST website, I think that's a perfect example.

**Lea Alcantara:** Yeah, yeah.

**Emily Lewis:** So we started talking about redesigning this website three-plus years ago. [Laughs]

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**Lea Alcantara:** Yeah, yeah. [Laughs]

**Emily Lewis:** And it's still not done.

**Lea Alcantara:** And I think we mentioned it every like year in review. [Laughs]

**Emily Lewis:** I know it's really bad, but anyways, it's not that we didn't identify what needed to be done, we did. We even had project management for it and planning, and we would verbally say to each other in our check-ins, "Yes, this is going to move forward. This is going to happen." But it really wasn't.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And the truth of it is, this is just one example, but these are tasks that are important; they're not ones that can get done because they can contribute to losing opportunities and they definitely cause tension in our relationship, and so we spent some time in the past few months trying to figure out why this was happening. So just to offer my perspective, I'm such a task-driven person, and so I was feeling like I was asking about things getting done; they weren't getting done, but I wasn't being told why.

**Lea Alcantara:** Right.

**Emily Lewis:** And then I didn't push.

**Lea Alcantara:** Right.

**Emily Lewis:** I would just sit back and was like, "Why the F is this not happening? What does this mean? Does she not care? Does she not want this?"

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**Lea Alcantara:** Right.

**Emily Lewis:** Like my mind went to some of the worst places.

**Lea Alcantara:** Right.

**Emily Lewis:** Because that's how I view tasks, and I viewed it if I said, "Is this happening?" and she said yes at that minute was, but that was it. I didn't follow up in detail. I didn't articulate clearly to Lea like what this was doing to me. And then meanwhile, Lea, on your end, where were you coming from and where did the communication fall for you?

**Lea Alcantara:** Well, for me, I think, and we'll touch on this a bit, it's with that business profitability mindset where if there was a client-specific task that I had to do or a sales task that I have to do, that took precedent above everything, and the way I poorly managed my task was like it's out of sight out of mind. So to me, unless it was making us a ton of money, I was like, "Okay, it's not a priority. We'll get it done, but it's just not a priority to me," and I think it's just like it depends on what's on the plate at the time. So it's kind of like, "Hey, we've got time. Okay, let's work on it," and then, "Okay, no, we have a client now. Let's forget about it completely," and that's not really a great way to deal with internal tasks because then nothing happens when you have these internal priorities.

**Emily Lewis:** So one of the things we're trying to do with that is that, well, first and foremost, I'm kind of looking at the big picture each month and identifying what really needs to move forward internally.

**Lea Alcantara:** Yeah.

**Emily Lewis:** So we almost never have problems... I mean, not almost ever, we never have problems getting client work done, like ever.

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**Lea Alcantara:** Yeah.

**Emily Lewis:** And I can't think of a time we've missed a deadline, ever.

**Lea Alcantara:** Yeah.

**Emily Lewis:** So this is purely for internal projects and operations, and so I take a big picture look at that each month and identify the things that seem most critical to move us forward and share that with Lea so she's real clear that no matter what happens, these things have to be at least touched. They have to be discussed.

**Lea Alcantara:** Right.

**Emily Lewis:** If they can't be done, then we need to figure out why and how to move it forward in a different way.

**Lea Alcantara:** Right.

**Emily Lewis:** And then each week I sort of revisit it and make sure it's still aligned with what may have changed that week, so that sort of is the high level.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** But within that, I think it's also been important for our discussion. This isn't something we necessarily like write down or log anywhere, but if there's a priority, it needs to be looked at beyond your measure of profitability or whether it's bringing in income.

**Lea Alcantara:** Exactly.

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**Emily Lewis:** Like...

**Lea Alcantara:** Or short term only.

**Emily Lewis:** Right.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Like redesigning this podcast's website, it's really easy to say, "Well, that's not important because..."

**Lea Alcantara:** Right.

**Emily Lewis:** I mean, frankly, it's never made a profit. We don't make money off of this thing; we lose money. But truth of it is, it directly impacts the perception of our podcast, especially a web podcast.

**Lea Alcantara:** Right.

**Emily Lewis:** It's also a direct reflection of us as developers and designers.

**Lea Alcantara:** Yes.

**Emily Lewis:** It doesn't look good if our own property isn't reflecting what we can do.

**Lea Alcantara:** Right.

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**Emily Lewis:** And if you take those thoughts a little bit further, you could speculate. Obviously, correlation doesn't equal causation, but this could impact our ability to book guests. It can impact our ability to get sponsors and listeners. So that makes it a priority. So it's not money, but there are other things, so having those more detailed discussions that are less black and white and more of the gray area of what a task might do for the business.

**Lea Alcantara:** Right. And also taking that larger view, so it's like I think what I struggled with was I was just thinking about the specific task and not thinking about the big picture impact, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And if we're even thinking about the other big picture impact, so you talked about the impact of perception of our show, but the projects we put out affects our perception as professionals, period, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And that could affect people's perceptions of how Bright Umbrella works.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And this one website isn't, of course, a reflection of every single project we've ever done, but it's one of the more prominent ones that people have access to in a regular basis, and if we want to have the best people on our show to talk about leading edge tech or web or design and our website is five years old, that doesn't reflect well on us as Bright Umbrella.

**Emily Lewis:** And I think it's worth saying because I feel like this at least has been our experience is that all of that sounds really common sense, but we were not having that conversation.

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**Lea Alcantara:** Right.

**Emily Lewis:** I was just being like, “Why don’t tasks getting done?” And Lea is like, “Oh, it’s not a priority.” Do you know what I mean? [Laugh]

**Lea Alcantara:** Right, right. [Laughs]

**Emily Lewis:** We didn’t get any further.

**Lea Alcantara:** Yeah, yeah, yeah.

**Emily Lewis:** It was only until we’re like, “Why are we disconnecting on this?” That there was this moment where I think in my mind, I knew all the reasons why it should move forward, but I wasn’t saying it to Lea.

**Lea Alcantara:** Right, right.

**Emily Lewis:** I wasn’t reminding her about that, allowing her to kind of reflect on it from her perspective. I was just like, “Oh, well, there’s too much black and white thinking in how we approach this where task is assigned, done. It’s just never that simple when it comes to something like this.

**Lea Alcantara:** Yeah, agreed.

**Emily Lewis:** And I also think, Lea, maybe you could talk about this a little bit more. So you’re just managing your tasks a little bit different once you know what’s critical and what’s on your plate for the month or the week. I feel like I can see you’re starting to do it differently, but I’m not actually there with you knowing how you’re doing it differently.

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**Lea Alcantara:** Right. I think it's just the clearer the picture is for me, the easier to go from Point A to Point B, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I think the irony of a lot of this, because earlier in the show, you're talking about how like this never happens with client work. [Laughs]

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I think we just need to treat our own business like client work where, not just the tasks, like we actually understand why we're doing the particular task.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I think that has also helped me fulfill the particular task, because when it's internal, yeah, I mean, it's really easy to dismiss it because it's an internal task.

**Emily Lewis:** It really is. But I feel like there's nothing better than a really crappy year to make you really re-think all of your assumptions, including the importance of some critical internal task.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And if you have an internal task that is really tied to your brand, like this podcast, do not ignore it.

**Lea Alcantara:** Yeah, absolutely.

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**Emily Lewis:** Yeah, because you're shooting yourself in the foot. So another challenge we had beyond priorities and moving tasks for the internal tasks in our partnership was kind of an unequal distribution of work, which led to a lot of frustration and resentment. Lea, do you want to kind of take the lead on this and kind of go into – upon reflection – why we think it was happening and what we're doing about it?

**Lea Alcantara:** Yeah, I think part of it, again, is what we touched on about priorities, like how we, you and I, weigh certain things we need to do for the day or for the week and it's based on that particular perception how we move forward, so that affected like it as an overall thing, but the other way is that you and I have completely different work approaches, let's say.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Work approaches as well as scheduling approaches,

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And then on top of that, you had a lot more experience working for other people and working with larger teams versus me, myself, and I.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So juggling multiple priorities and things like that, I'm used to, back when I was just running LeaLea Design, it's like "Oh, one client. Point A to Point B. Done" kind of situation as opposed to now there is Bright Umbrella task, make sure that CTRL+CLICK CAST is done, multiple projects just going on at the same time, and how I was doing things as a freelancer kind of bled into how we were handling Bright Umbrella, and that really wasn't working.

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**Emily Lewis:** [Agrees]

**Lea Alcantara:** And you're over there going like, "Well, what's happening here?" [Laughs]

**Emily Lewis:** [Agrees]

**Lea Alcantara:** "Why isn't she getting her stuff done?"

**Emily Lewis:** Let's talk about the schedule stuff. I think this is less of a thing if you work as an employee because typically you're a 9-to-5 and you have no say.

**Lea Alcantara:** Right.

**Emily Lewis:** But when you work for yourself, you have the opportunity to decide what your schedule looks like, what your life looks like, almost.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And I feel like, again, upon reflection, we didn't dive into this deep enough when we were starting talking about becoming partners.

**Lea Alcantara:** Yeah.

**Emily Lewis:** You know, in my mind, like I never want to work the crazy hours I once worked for other people.

**Lea Alcantara:** Yeah.

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**Emily Lewis:** And I kind of like start in the morning a little later than most people start kind of thing. For me, that's how I wanted my schedule to be, but I will put in those crazy hours when they have to happen. It's just sort of I think because I work for other people for so long and it wasn't really an option not to.

**Lea Alcantara:** Right.

**Emily Lewis:** Especially if like you're salaried, it's not hourly, you'd work until the work is done, and you wanted your schedule to be different.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Like I think you wanted your quality of life to be different, and we didn't really talk about that when we decided to be partners, and I think that's important.

**Lea Alcantara:** Yeah. We're talking about our particular situation, but I do think that this is an overall like industry-wide situation over at how do you divide time, quality of life, and actually doing your work and having a particular output, especially those with families, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** You know, a 60-hour work-week might not necessarily translate well for a good home life, right?

**Emily Lewis:** Yeah, and so I think that was a challenge to recognize that Lea didn't want to take the same approach that I necessarily took to her schedule, and so what did that mean to the business? Like that essentially meant that I was carrying more than I thought, I guess, was fair. It really came down to a perception of fairness in my mind.

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**Lea Alcantara:** Right.

**Emily Lewis:** And I think one thing that was really critical for me to be able to work through it was kind of something Lea touched on is Lea has really never worked for someone else the way I have.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** Like I spent a better part of my career working for other people, and I don't know, you just learn kind of what stuff is supposed to happen, and in my mind, I thought she knew, and she didn't. So part of it is taking into account that it's not intentional or a lack of caring or that she wanted to do less work or wanted me to do more work, but it's that there's so much that's unsaid when you learn how to work for someone else that if you don't tell someone, they're never going to know, and so one thing we did is we really identified the areas that needed a lot more this is how you do it. So it's really creating processes for everything internal from sales to how to manage tasks, how to look at your schedule each week, that kind of stuff, so that it's really clear what next steps are.

**Lea Alcantara:** Right.

**Emily Lewis:** And also to help each of us be more independent in our own responsibilities so there's less on the other person's shoulder.

**Lea Alcantara:** Right.

**Emily Lewis:** We divide stuff up, but it wasn't divided in the sense of like you took it and went with it with one area and I took it and went with it in another area, which it got a hell lot muddy in the middle, which meant more time in areas that we just didn't plan for.

**Lea Alcantara:** Right.

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**Emily Lewis:** So creating these processes really kind of says, “This is yours. This is how you proceed.” And even better, if Lea goes on vacation, those processes are detailed and I can reference them if I don’t know how to proceed on a task that’s normally on Lea’s or vice versa.

**Lea Alcantara:** Yeah, right.

**Emily Lewis:** So I feel like this sort of process-oriented operations approach that we’ve never really had in the business is helping with that.

**Lea Alcantara:** Yeah, and I do think, as we’re talking, like those who have probably larger agencies are like, “Duh, employee manual.” [Laughs]

**Emily Lewis:** Yeah.

**Lea Alcantara:** But as Emily pointed out, it was me, myself and I for a long, long, long, long, long time.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So I dealt with my priorities my way, my time, my way, and part of that was also communication issue in that I didn’t articulate that to Emily either, as in, “This is just the way I’ve always done it.” You know?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And not really considering how is this helping my teammate, how is this helping the business, is this all in service of moving us forward versus it’s just like, “Well, just because it’s comfortable for me, it doesn’t mean it was the right approach.”

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**Emily Lewis:** I love documentations so all of this totally seems like not just helping us immediately, but we're creating this asset of how we operate, just adding more into that.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** And you know, I want to put this out there because this may affect other partnerships, but the reality is that with the kind of responsibilities or the kind of experience that I have lends me to having me more responsibilities right now. We changed the ownership percentage of the partnership.

**Lea Alcantara:** [Agrees]

**Timestamp:** 00:19:59

**Emily Lewis:** And this was something that was difficult. I'm not going to speak for you, Lea, but this was difficult for me because it's not what I wanted in terms of how I envisioned all of this going.

**Lea Alcantara:** Right.

**Emily Lewis:** But the truth of it is that making this change made me feel things were more fair, which was really important to me.

**Lea Alcantara:** Right.

**Emily Lewis:** It also reminded me that Lea is still my partner and we're still trying to find a way to work through stuff. So it was a sign that, you know, I don't know how to really articulate it, but that there's still a lot of compromise and collaboration going on, and I think that's important to think about when it feels like the partnership, at least on my end, was suffering.

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**Lea Alcantara:** Right. And I mean, on the other end here, it does take some real honest self-reflection over where things are and really listening to your business partner's perspective and trying to figure out, like what do we want in service of the business and the success, and how do I want my career to go, and on and on and on.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But also my personality is different from others. I know that some people struggle with this particular discussion because I know that there's people with power issues. [Laughs]

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And that's not how I view this. I view this in the lens of fairness and reality as opposed to like "I need to wrestle my percentage or whatever." That's not really where I'm at. It's more about what is the accurate representation. Is Bright Umbrella important to me? is this still the type of work I want to do? Those are the types of questions that I ask myself, and between Emily and I, like I think it's fair.

**Emily Lewis:** I think the last challenge in our partnership is kind of the main challenge that affected everything is our communication. We always thought our communication was great, but it really wasn't. It wasn't.

**Lea Alcantara:** Yeah.

**Emily Lewis:** We were not communicating enough about the things we needed to communicate about, which contributed to all the other challenges, I think.

**Lea Alcantara:** Right.

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**Emily Lewis:** For me, I really think one of my biggest wrong assumptions was that our biweekly check-ins was enough.

**Lea Alcantara:** Yeah. I would definitely agree with that, and I think because our check-ins were long, we thought that that was enough.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But actually, we're kind of experimenting with breaking up our check-ins and all that stuff and upping the frequency.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I think that lets us be a little bit more aware of what's happening at the present as opposed to just like...

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because you forget what happens to like in two weeks, you know?

**Emily Lewis:** Oh, especially if you're completely burned out or overwhelmed, which is like me right now.

**Lea Alcantara:** Yeah.

**Emily Lewis:** I can't remember what I did a half hour ago. [Laughs]

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**Lea Alcantara:** Right, right. So it's just like, well, having more frequent check-ins, and I know that a lot of larger agencies do have those weekly reviews of where things are going to pivot, and it just wasn't something that Emily and I used to do, and now, we are.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And more specifically as well, because I feel like we've always done the client overview and all that kind of stuff, but we never was like, well, frankly asking what went wrong this week.

**Emily Lewis:** I think you just said the right thing, "frankly."

**Lea Alcantara:** Yeah.

**Emily Lewis:** I think that's where you and I were missing something because we would say, "How are you feeling?" We will be like, "Oh, I'm really hopeful that things are going to get better."

**Lea Alcantara:** Right.

**Emily Lewis:** Because we were.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** Yeah, that wasn't an inaccurate statement, but it's not specific and it's not honest enough either.

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**Emily Lewis:** Exactly. I think a perfect example that sort of alludes to this is that I wasn't telling Lea what I wanted. I was just saying, "Well, why is this not done? Or is this going to get done?" I wasn't taking it further and saying, "I need this done because I'm starting to feel concerned about X."

**Lea Alcantara:** Right.

**Emily Lewis:** Or, "I need you to tell me specifically what's going on." Again, this comes from working for other people, like I think when you're like in an employer-employee situation, if someone is like, "This needs to get done," you're just like, "All right, it's getting done," and if you don't, you get a talking to or you get written up or whatever.

**Lea Alcantara:** Right.

**Emily Lewis:** And that's not how we were running our business.

**Lea Alcantara:** Right.

**Emily Lewis:** But it's also kind of it's what I learned in my head, and so if I have a problem moving a task forward, I know I have to go talk to my manager about it because I know it's going to affect other people, and I wasn't explicit with Lea that I was like, "I need to know what's happening to this and this because I can't move this forward and this is happening," and I was just like, "Well, I want Lea to take ownership and be a partner and feel like I'm not telling her what to do." Because that was a big thing, I hate being told what to do, and so I do not like telling other people what to do.

**Lea Alcantara:** Right.

**Emily Lewis:** It really makes me uncomfortable. It's, ugh. I don't even know how to describe it. It's probably some historical childhood stuff.

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**Lea Alcantara:** Yeah.

**Emily Lewis:** But I'm so uncomfortable with it, so I was trying not to. But by doing that, I wasn't communicating with you.

**Lea Alcantara:** Yeah, exactly, and that's the thing where it's like assumptions really are the worst thing.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because I feel like both of us are intuitive people that we know that there's like a general feeling of like discomfort or like confusion or whatever, and I think this is a struggle. It's just like how do you speak about it frankly without rocking the boat in one way or the other, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Like for example, I was very much aware, still am, how much you have on your plate, so my thought process for me was it's just like, "Don't tell her anything, like don't say anything, let's just keep on like head down."

**Emily Lewis:** You thought that it would be putting more on my plate.

**Lea Alcantara:** Right, right. Or I was like the bearer of bad news with changing priorities.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Like to me, I'm just like, "I'm just going to change the priorities and do something or not do something," when that's definitely not the way forward because you felt like you were in a

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black box going like, “What’s happening here?” And in my mind like I had justification for this, that or the other, but I never communicated that so you didn’t even know that I wasn’t just randomly dismissing something.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because there are certain tasks that we decided a few weeks ago or whatever, yeah, that should move forward, but you know circumstances change, the business changes, and you have a discussion with the client, and that is no longer the right way to move forward, and then either I just don’t do it and then I don’t tell you that circumstances have changed, that’s why I decided not to do it, and that probably just a message explaining that, “Here’s why we’re not going to do this anymore.”

**Emily Lewis:** [Agrees]

**Lea Alcantara:** It probably would just move a lot of things versus the just not doing it.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because it’s not even about the task being done or not done. It’s like figuring out why, like was there a reasoning over moving forward or not moving forward with this, and then after that was discussed, then we both would have put in our two cents whether or like, “No, Lea, I do think this is important, or yes, Lea, I agree, like let’s delete this entire to-do list.” You know?

**Emily Lewis:** Yeah. So we thought we were communicating, but not really.

**Lea Alcantara:** [Laughs]

**Emily Lewis:** [Laughs]

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**Lea Alcantara:** Yeah, yeah.

**Emily Lewis:** So what we're doing about it? One is so we still have that biweekly check-in and that one is going to stay strictly on clients and projects.

**Lea Alcantara:** Right, yeah.

**Emily Lewis:** And that happens on Mondays, the start of the week.

**Lea Alcantara:** Right.

**Emily Lewis:** What we've now added is a meeting on Fridays at the end of the day, at the end of the week, and we're calling it our "temperature check." This used to be just a bullet in our biweekly check-in.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Now, the whole meeting, limited to 30 minutes, is really the temperature check of, and I'm trying to recall what's in our bullet points, but it's like what's good, which we've always had no problems talking about, but also what's bad, including, how are you feeling? Are you feeling frustrated about something? Are you feeling exhausted?

**Lea Alcantara:** Right.

**Emily Lewis:** Do you just need someone to tell you like it's okay.

**Lea Alcantara:** Right.

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**Emily Lewis:** Because honestly, sometimes it is like that. [Laughs] Sometimes there is no task-related solution, but rather I need someone to hear me.

**Lea Alcantara:** Yeah, reassurance.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Yeah.

**Emily Lewis:** And it's not about really clients. It's really about us in our operations.

**Lea Alcantara:** Right. And also too like expand on like, "Well, what's bad?" That's kind of like a loaded term, but the reality is that it could encompass a lot of things where it doesn't necessarily mean a mistake or anything like.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** I think that's the perspective that we need to make sure that people understand.

**Emily Lewis:** Good point.

**Lea Alcantara:** It's just that like, "Well, what could have been better, you know?"

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And then that gives you a little bit more fodder over like, "Hey, you know, this happened. This was how I felt after this happened. I think this X moving forward would have changed this from bad to good in that kind of situation."

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**Emily Lewis:** [Agrees]

**Lea Alcantara:** It's more specific.

**Emily Lewis:** Yeah. You know, I even think, though, Lea, that us giving ourselves permission to talk about what was negative, like having it as a bullet point in our temperature check like, "All right, we know this might not all be like, 'Hey, it's all great,'" because we have an inclination to want to emotionally support each other that way, and I think that's why we avoid giving each other bad news and not talking about the hard stuff.

**Lea Alcantara:** Right, right, right.

**Emily Lewis:** But the truth of it is that it is important. We both know it's important now, and we are giving ourselves permission to talk about it without having it be, "Oh, god." Do you know what I mean?

**Lea Alcantara:** [Laughs]

**Emily Lewis:** You know, what does this mean?

**Lea Alcantara:** Right, right, right.

**Emily Lewis:** Is everything over? Do we have to make major...? No, this is just normal conversation. We've got to talk about some of the stuff that isn't always roses.

**Lea Alcantara:** Right. And why it's so important for the frequency weekly, because I feel like back when it was biweekly, like things simmer too long, you know?

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**Emily Lewis:** [Agrees]

**Lea Alcantara:** So beyond the first issue of having it, the frequency was not enough; A, you forget something; B, you don't forget it, but then it becomes like a "mountain instead of a molehill" kind of a situation, you know?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So addressing it sooner, make sure that any issues are diminished as soon as possible.

**Timestamp:** 00:30:00

**Emily Lewis:** Yeah, totally. Well, we have a whole bunch of other challenges that happened this year. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** So we want to make sure to get to those, but I do think it's important that we started with the partnership stuff because it's really the foundation of the business.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And I have a really strong feeling that all of those problems contributed to some of our other challenges, and so I think when it comes to your business or your work environment, look at your relationships and communication first and see what might be falling apart there because it could be the foundation that's leading to other challenges.

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**Lea Alcantara:** Yeah, absolutely.

**Emily Lewis:** So the other major challenges were about sales this year.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** Lea, sales is your area, so you want to kind of dive into some of this.

**Lea Alcantara:** Yeah. The long story short is that we weren't converting leads, including good ones.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And by good ones, I mean, leads that we were going after, like nonprofits, schools, leads from our colleagues, those types of things that should have turned around, and we would have won.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And we had to take a look and be like, "Well, this is now looking like a pattern instead of a one-off thing." Right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So like the first step is like really kind of admitting you have a problem. [Laughs]

**Emily Lewis:** Yeah, yeah.

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**Lea Alcantara:** Because I think like sometimes it's easy to be like, "Well, it is what is, you know, that something..."

**Emily Lewis:** Yeah, I feel like you and I spent too many months being like, "Well, I hope it's going to turn around," instead of saying, "You know what, it isn't. Let's do something now."

**Lea Alcantara:** Right.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And do that sooner.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Just like with anything, there's never going to be like exact, correct, right answer.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But based upon our reflection, part of the reason why we think leads weren't moving forward is, A, more competition.

**Emily Lewis:** Yeah, for sure.

**Lea Alcantara:** There's a lot of great people working on the web today, and with that in mind, our pricing needs to be adjusted.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** That doesn't necessarily mean shooting ourselves in the foot still, like we still need to price so that our business is sustainable and profitable, but part of it, too, is like we had just come off in a great year.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So we were flying high, pricing high.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And that's not always the case for every lead, so you have to kind of figure out where people are coming from.

**Emily Lewis:** Yeah, yeah.

**Lea Alcantara:** And on top of that, with all the pricing, the way we even presented the options, we weren't thoughtful enough about that either.

**Emily Lewis:** Can you give an example of that because I think that might be something that would stand out to a listener?

**Lea Alcantara:** Right.

**Emily Lewis:** Like what do you feel we weren't thoughtful about that? Maybe one example.

**Lea Alcantara:** So one thing is that overwhelming them with too many options and too many technical details all at once.

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**Emily Lewis:** [Agrees]

**Lea Alcantara:** Clients doesn't really care or know. You should just point out very specifically the outcome and what they're getting in one to two prices, maybe three, that kind of stuff, but that could be all distilled to how we were presenting everything was complicated and it should have been simple.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And that was actually the feedback one particular lead mentioned was like, first of all, it was expensive, and second of all, it was just like there were too many bullets, too much info.

**Emily Lewis:** God, we had a whole freaking series last year on how to talk to clients.

**Lea Alcantara:** Right.

**Emily Lewis:** But we still have a tendency to be like, "But you're getting all of this for this," you know?

**Lea Alcantara:** Yeah.

**Emily Lewis:** But all of that means nothing to them because it's just so overwhelming.

**Lea Alcantara:** Right, yeah.

**Emily Lewis:** So we definitely fell into that pattern a little bit.

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**Lea Alcantara:** Right. And I've discussed this with like other colleagues of ours, like the way you present pricing and options should also be dependent on the particular project and lead.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And so does it make sense to just give them a number via email? Should you get pricing, that discussion, started right away on the phone.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So then it's just that by the time you do have a final quote or final proposal, that like everything is primed, and we did not have a process for that.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** We were just like, "Here are the..." [Laughs]

**Emily Lewis:** [Agrees] [Laughs]

**Lea Alcantara:** "Here's all the stuff you got. Here's the price. Yes/no?"

**Emily Lewis:** Yeah. And right before we start recording today, you made a comment. You're like, "Oh, our "closing the loop" emails are working."

**Lea Alcantara:** Yeah.

**Emily Lewis:** So talk about that a little bit.

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**Lea Alcantara:** Right. So the other thing in terms of – so we talked about our pricing and the presenting the pricing – follow-ups. Follow-ups, follow-ups, follow-ups, I wasn't doing a good enough job.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I didn't have tasks and processes in place to be really intentional about those follow-ups, like I think my follow-ups were usually just like, "Let me check the email. Let me respond." Sometimes, it's during the week, if I check my scent and then follow up, so that kind of thing.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So I thought I was doing a good enough job following up, but I wasn't.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** I wasn't closing the loop. I wasn't understanding that sometimes clients get busy and so just because they don't respond to you right away doesn't mean you abandon it completely.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I think that was like a rookie mistake, and just because they don't respond to you right away doesn't mean it's a no.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So just like the frequent follow-ups, and then also the specific email that Emily mentioned is called "closing the loop." So we'll link to the resources in the show notes. There's this

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specific email where if there's a client or prospect that hasn't gotten back to you after frequent responses, there's a "closing the loop" type of email that you send that basically very short, very sweet that says like, "It looks like your priorities have changed. Let me know if we can help you." Done, and then you change the subject line to "Closing The Loop," and that really prompts somebody to get back to you.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** For whatever reason, there's something about the psychology of the firmness of it.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I think also because like you're now taking control of the communication as opposed to just waiting.

**Emily Lewis:** Yeah.

**Lea Alcantara:** Waiting, waiting, waiting.

**Emily Lewis:** Yeah.

**Lea Alcantara:** I think like a lot of the follow-ups and just communication is just like setting the tone of how you want the communication relationship to go.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So like even with the follow-ups to basically say, "I'll get back to you next week if I don't hear from you."

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**Emily Lewis:** Right.

**Lea Alcantara:** So you're already setting the intention and they will expect to follow up as well.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So that also prompts them like if they really don't want you to follow up, they'll get back to you, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** It's those types of tweaks.

**Emily Lewis:** Yeah. And I feel like that's just one example of where you've made a shift in the sales process, but I think it's just one of the things that was part of – I think we spent almost a solid eight weeks, almost all of our energy – kind of figuring out what our sales process needs to be because it wasn't defined.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Like I said, I will be like, "Well, Lea, you're going on vacation. What do I do?" [Laughs]

**Lea Alcantara:** Right, right, right.

**Emily Lewis:** There was nothing I could follow to know what Lea was doing behind the scenes, and then there was nothing...

**Lea Alcantara:** Right.

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**Emily Lewis:** I feel like also, Lea, if I remember some of our conversations like almost because you didn't know what all the next steps should be, it could kind of create this cognitive load in your mind where you couldn't move forward on it.

**Lea Alcantara:** Right.

**Emily Lewis:** You were like, "Well, I don't really know what's next or what the priority is, and so I'm stuck."

**Lea Alcantara:** Right, right.

**Emily Lewis:** So we put a lot of energy to coming up with a sales process that Lea is comfortable with, that I find easy to follow, even though it's kind of molded how Lea approaches things versus how I approach things that has templates and tools.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And it's like Lea's toolkit. [Laughs]

**Lea Alcantara:** Yeah, yeah. [Laughs]

**Emily Lewis:** But we didn't have that and we needed it.

**Lea Alcantara:** Yeah, yeah. Absolutely. I think like a lot of things were just more intuition I think in like how we... again, like I think a lesson really is to be more reflective over like just because this is how you've done it in the past doesn't mean this is the right way to do things.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** And just because you're used to it doesn't mean that's good.

**Emily Lewis:** I want to just briefly sum up another lead, another challenge rather. I don't want to spend too much time on it because I don't think we quite yet know how this is going to go yet, but I think it's worth mentioning.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** So we also, in addition to not being able to convert leads, we weren't really getting leads, and Lea spent a lot of time kind of looking at the past five years of clients, which were the great clients. how did we get them, the real numbers and reality of our business, and the truth of it is that we took a direction with our content marketing away from our peers a couple of years ago and tried to focus on marketing to our clients in their verticals, specifically nonprofits and education, and the truth of it is that it hasn't helped us in either of those industries at all... at all.

**Lea Alcantara:** [Agrees]

**Emily Lewis:** I can't stress that enough. I mean, it has helped us amongst our peer group to understand where we specialize.

**Lea Alcantara:** Right.

**Emily Lewis:** And that's a really weird twist on this that we would never have figured out, so we were writing about education and nonprofits for education and nonprofits, but it wasn't getting us anywhere.

**Lea Alcantara:** [Agrees]

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**Emily Lewis:** So we are now taking a shift to focus back on marketing to our peer group, essentially reminding our peers what our skills are, which means talking more about tech. Yehey! [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** Talking less about the client needs, the client value, the client benefits, because the clients weren't coming to us for that that kind of content effort. They weren't responding to it.

**Lea Alcantara:** Right.

**Emily Lewis:** But our peers who know that we specialize in those areas started sending us leads because they don't.

**Lea Alcantara:** Yeah.

**Timestamp:** 00:39:41

**Emily Lewis:** So it's sort of a weird twist on content marketing for an industry, but not kind of thing, that we're still trying to figure out, but also part of that is investing even more in our relationship building and less on blogs and outreach. We were doing email campaigns where we were trying to emphasize our nonprofit expertise or writing blog posts on why nonprofit should move to HTTPS, and it just wasn't getting us anywhere, so we're going to shift the energy to really just rebuilding or reestablishing or strengthening existing relationships that we have with our peers and knowing what they're doing, having them know what we are doing, that's how we got here in the first place, and so we're kind of going back to it.

**Lea Alcantara:** Yeah, it really is...

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**Emily Lewis:** Weird.

**Lea Alcantara:** It's going back to basic kind of like full circle situation, except now we're looking at it with a more critical business lens and we understand the why as opposed to feeling like everything was kind of an accident almost, you know?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** We understand the reason why there's this particular perception. We understand why this is the way forward. But again, it's just like trying to review everything with a critical lens and seeing like why is this working or not working.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And it's still too early on to say that like we're a 100% going towards this thing, because we're not actually, like we haven't abandoned that vertical. We still are passionate about social causes and education, but how we're communicating that, and who we're communicating that to has shifted.

**Emily Lewis:** Exactly.

**Lea Alcantara:** So it's just like, again, what are we known for, what are we doing well, and how can we focus our energies in the right area?

**Emily Lewis:** So this next one, this one, God, it still hurts. [Laughs]

**Lea Alcantara:** Yeah.

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**Emily Lewis:** So we lost our largest client this year, and I'm not going to lie, I'm still very not feeling good about it on lots of points, which for political reasons, we won't get into on this podcast. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** But there were some lessons learned upon losing a client, and it hit the bottom line so hard on top of the challenges with sales this year. So this one is still so weird because I think the truth of it is, we definitely could have done a better job of selling the tech and demoing how effective it would be to help their jobs, make their jobs easier.

**Lea Alcantara:** Right.

**Emily Lewis:** But we were sort of doing it to not enough of the team, like we only had access to a very small part of the decision makers.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And we failed there. We failed to push that selling the tech, the demonstration of the tech, across the board as much as we could have. We didn't think we needed to. We kind of got a little, "Well, this has been a client for so long and they're so happy," and all this other stuff. But yeah, we didn't get in front of the right decision makers soon enough. Our contacts are marketing team. They were happy, they seem to want to move in our direction, but that really wasn't; they don't have the final say.

**Lea Alcantara:** Right. Well, and we were siloed, like because we weren't proactive enough, like then only that team saw our value.

**Emily Lewis:** Yeah.

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**Lea Alcantara:** But just like with larger organizations, there are several moving parts that get things done, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Speaking of that “get things done,” we’re trying to take responsibility for our part, but some of it was also the client, right?

**Emily Lewis:** Yeah, for sure.

**Lea Alcantara:** Like they weren’t telling us what they were doing or what they wanted, granted, we didn’t ask enough.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But they weren’t clear about their goals and internally, it seemed that way, and perhaps, frankly, what was a priority for one team wasn’t a priority for another.

**Emily Lewis:** Exactly.

**Lea Alcantara:** Right.

**Emily Lewis:** Exactly. So what we are trying to do about it? This one, it’s a little more nuanced, but we rely a lot on long-term clients. We love that long-term relationship building, getting to know a client’s business, but you can get complacent when you’re in that place.

**Lea Alcantara:** Right.

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**Emily Lewis:** And so what we're trying to do is anyone who's on a retainer or if there's something who we do ongoing work with throughout the year, we're just always going to check in with them, insist on a face-to-face call.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Even though they're happy with the project we wrapped up just two days ago, we're still going to make sure that at the start of the month or monthly or whatever, there's a face-to-face talk, and it's, "What's going on with your business? Is there a new direction you're taking? Is there a new leadership? We need introduction." It's like sort of just being proactive about our relationship, but also really forcing them to tell you what their priorities are.

**Lea Alcantara:** Right.

**Emily Lewis:** If you're face to face, it's harder to like not. Do you know what I'm saying? [Laugh]

**Lea Alcantara:** Yeah, yeah. [Laughs]

**Emily Lewis:** We ask them in Basecamp, "Has anything changed? Is anything new?" And they just don't respond, and then we don't push, but face to face helps with that.

**Lea Alcantara:** Yeah.

**Emily Lewis:** So that's now part of our processes. It's just standard operating procedure. And I think another big thing was we missed a lot of red flags with this client.

**Lea Alcantara:** Yeah.

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**Emily Lewis:** I think in part because they were a long-term client, and I think we didn't really know that we should be looking for red flags. Lea, that's been a big part of your sales process. Why don't you talk about that a little bit more?

**Lea Alcantara:** So whenever you see issues with the client, not only should you just identify them, you should be specific about identifying those red flags and then actually have a plan of action to either address those so that things could be moving forward in a more positive way, or it could be an indication that it's time to move on from this client.

**Emily Lewis:** Oh, something came to me. I want to interrupt you because I think this is a perfect example.

**Lea Alcantara:** Sure.

**Emily Lewis:** So this client, they said to us, "We wish you could get things done a little faster," and we said, "Oh, we can absolutely do that. We have a special retainer that guarantees 2-hour turnaround time," because they were just on like a regular retainer, which is...

**Lea Alcantara:** Right.

**Emily Lewis:** They go to the top of our queue, but it's not emergency 2-hour response time. So we said, "Oh, well, we obviously can give this to you." Well, they didn't want to pay for that.

**Lea Alcantara:** Right.

**Emily Lewis:** So that's a red flag, like they're telling us they're not happy with something and we're offering them a solution and that for our business, for us, that is a red flag.

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**Lea Alcantara:** Right.

**Emily Lewis:** Because they're wanting something, but they're saying no, but are we actually still like making them happy kind of thing, like they're not saying they're unhappy, but we just didn't own that.

**Lea Alcantara:** Right.

**Emily Lewis:** That was more of, "Oh, well, they said no, so okay, they must be fine with what things are."

**Lea Alcantara:** Right.

**Emily Lewis:** And I don't think they were.

**Lea Alcantara:** Right. And I think it's just again like seeing what do they value, what can we bring to them, and we weren't thoughtful enough over like whether this was workable or not.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because that's the other thing, too, like beyond just the red flags, I think a common complaint within agencies and us included is like, "Oh, this sucks or this has happened," or whatever, and then you move on or you just take it, "Yeah." [Laughs]

**Emily Lewis:** [Laughs]

**Lea Alcantara:** And that's not the way to move forward. You should be frank about any particular issues, because even the red flag discussion or like being frank over like what are the issues of this

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project, it can be an intimidating thing to ask because your purposely like asking for some negative feedback, but also it's an indicator when things are going well, even when they complain.

**Emily Lewis:** Yeah.

**Lea Alcantara:** Because I'm thinking of another client of ours, who's still our client, who was super, super happy. They were frank about like, "Well, we didn't like this or that or whatever." But every time they said that, they're like, "Blah, blah, blah. We're just being totally nitpicky."

**Emily Lewis:** Picky.

**Lea Alcantara:** "We're just so picky," and then they follow that up with like an immense amount of compliments, which was fantastic.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But what that showed is, A, they gave us critical feedback that we can shift in the future, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And then also, them giving that feedback and then following up with praise or that kind of stuff is an indicator that the relationship is healthy, that they feel that they can be honest with you about like critical feedback, but they want to continue working with you.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** Because they know that they trust that you can overcome those like little niggly things. If you ask this question, you get the negative feedback and it isn't followed by relationship-building kind of compliments or anything, then that's a big sign that something is wrong.

**Emily Lewis:** Yeah. It makes me feel like this is the kind of stuff that [Rachel Gertz was talking about in our show earlier this year about risk management](#).

**Lea Alcantara:** Yeah.

**Emily Lewis:** When you're in this relationship with a client, part of your job as a project manager is to help manage risks, and that means you need to know what are the signs of risk.

**Lea Alcantara:** Right.

**Emily Lewis:** What you just described is a perfect sign of risk. The client gives a complaint or some negative feedback and you try and address it, but you're not able to, and then that's it. That's actually something that's a risk right there; that could be a problem.

All right, so that's sales business. We *also* had challenges with the podcast. One, where we really struggled to fill sponsorship slots this year, and that's a problem because the podcast doesn't make a profit. We've said it before the show is a labor of love. We want to elevate our community. Business-wise, it's easier to align that investment as a marketing expense and really focus on the impact our show has on people's careers, but in a difficult year like this year, it is really challenging to bootstrap yourself to spend all the time that we do and pay for professional services, it's a real hit to the bottom line when revenue drops.

And so in terms of why it's happening, I think it comes back to one of the things Lea said with regard to sales in general, we have more competition out there. We are not the only podcast that people are

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listening to, not just about the web, but just podcast in general, so getting sponsorships, it's just a little bit harder, and the truth of it is it's like this isn't a new challenge.

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This has always been the case, it's just easier to weather when our client sales are good, and so we need to be more thoughtful about running the podcast. We're trying to find ways to streamline a little bit. If you've been listening to the show and listen to our [Podcasting 101 episode](#), you know that Lea and I did all the editing ourselves once upon a time and we've since handed that over to a professional editor, which means we're spending less time. We also get caught in the habit of "This is the way we've always done it so we keep doing it," and so we're trying to see, "Well, what could we change that would shave ten minutes here and ten minutes there," and just make it so we're putting a little less into the podcast without giving the podcast less, if that makes any sense.

**Lea Alcantara:** Right, because there's always a better way to do things.

**Emily Lewis:** Totally.

**Lea Alcantara:** Like, again, the editing situation, like just because Emily and I know how to do it in GarageBand or Audacity, it doesn't mean we should be doing it.

**Emily Lewis:** Right, exactly.

**Lea Alcantara:** Yeah, and it's just like there are better uses of our time and that's why we have an editor and just being a lot more efficient in general, just reflecting again about like how we run the podcast and actually adjust like trying out new recording software, seeing how we tell guests how to record, because that takes a lot of time, too.

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**Emily Lewis:** It does.

**Lea Alcantara:** And then in terms of like even marketing the podcast, “Here’s how we always did it,” but that doesn’t necessarily mean it was effective.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And so we’re trying to be a lot more ruthless over what’s working, what’s not working with promotions and scheduling a lot ahead of time, those types of things.

**Emily Lewis:** Yeah. And we won’t go into it too much, but you’re also taking a different tack with sponsors, being much more – I guess what we have always done in the past was once a year, at the end of the year, we would just do a call for sponsors, and we were fortunate, and got a lot of sponsorship that way.

**Lea Alcantara:** Yeah.

**Emily Lewis:** That’s not really the case this year, and there were a couple of years where it hasn’t been the case.

**Lea Alcantara:** Right.

**Emily Lewis:** And so this time we’re taking a more frequent approach asking for sponsors across social media in a different way, doing more frequent emailing versus just that end of the year once a year kind of a hit.

**Lea Alcantara:** Right. Just being a lot more like thoughtful and intentional about why we need sponsorship and even how we’re communicating the value of the sponsorship as well.

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**Emily Lewis:** [Agrees]

**Lea Alcantara:** Because I think it was just like, “Sponsors show,” the end. [Laughs]

**Emily Lewis:** Right, exactly.

**Lea Alcantara:** And then now it’s like, “Here’s why you should sponsor this show.”

**Emily Lewis:** And then, of course, you’ve heard us talking about it the past couple of episodes, or hopefully, you have. If you hadn’t, go tune in. We’re doing a [Patreon](#). Our hope is that more income means less bootstrapping ourselves, but our bottom line is we want to build a community that wants to listen to this show. We want to create content that you want to hear.

**Lea Alcantara:** Yeah.

**Emily Lewis:** We learn a lot from it. We hope you learn a lot from it. So we want money, but we really also want community. [Laughs]

**Lea Alcantara:** [Laughs] Right.

**Emily Lewis:** But there’s a business reason for having community, because it could show other sponsors that we have invested listeners that are worth advertising to, and it could increase listenership, “What is that? Oh, everyone else is doing it, I should do it too.”

**Lea Alcantara:** Yeah, kind of like basically, “Let’s hop on to the CTRL+CLICK bandwagon. Why not?”

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**Emily Lewis:** Yeah. So we're really hoping it's going to be a way for us to offset the cost of operating the show to give us more breathing room so that the content we create is better and the community we create is more engaged, and we really hope we can bring in enough money to really let us experiment with content to do something other than we've done in the past few years and see if there's a new way to connect and share information.

**Lea Alcantara:** And at the end of the day, business is all an experiment, right?

**Emily Lewis:** Yeah, yeah, totally.

**Lea Alcantara:** Like so everything that we've talked about today will be successful.

**Emily Lewis:** I have no idea. [Laughs]

**Lea Alcantara:** It's still too soon to know, but like I'm sure all the little agencies and business owners tuning in right now, you know this is the reality of running a business.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** There are no guarantees when you run a business. Even if you do everything "exactly right," that's not indicative of future success, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So we're hoping that at least we're being aware of our mistakes so that we cannot do them again.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** And also spot them sooner if it starts bubbling up.

**Emily Lewis:** And I think a part of that, which we really didn't talk about that much, but putting metrics in place, which everyone is like, "Well, duh."

**Lea Alcantara:** Right.

**Emily Lewis:** But we weren't, you know?

**Lea Alcantara:** Right, right.

**Emily Lewis:** We're like, "Oh, well, we hope to get more listeners." That's not a goal.

**Lea Alcantara:** Right, right.

**Emily Lewis:** That's just not specific enough.

**Lea Alcantara:** Right.

**Emily Lewis:** So we are from sales to operations to our partnership, every time we're going through a lot of changes.

**Lea Alcantara:** Right.

**Emily Lewis:** Each time we identify a change, our task is to say, "What do we hope to happen? When are we going to see if it's happening? When we look at it, if it's not happening, what are we going to do? If it is happening, what are going to do?"

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**Lea Alcantara:** Right, right.

**Emily Lewis:** So essentially, forcing ourselves to see problems sooner, see mistakes sooner, by building that into every new decision we make.

**Lea Alcantara:** Right. And I also want to point out though, like especially because I've had this similar chat with colleagues about measurement, like measuring anything, there could be a reluctance to that because it feels like you're tying someone into a box.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** But the reality is that, how do you know things are going wrong without reflecting?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And how do you know things are going right without even defining what success means? Right?

**Emily Lewis:** Yeah.

**Lea Alcantara:** And so that's what really measurement is. At the end of the day, it doesn't necessarily mean, "Let's put all the checkboxes, and then that's the correct way." That's not what we mean about measuring. It's just making sure that everyone is on the same page and that we can correct the shift if it's going off course or if it's going completely right, that we double down on the completely right direction.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** So just have perspective when you are measuring.

**Emily Lewis:** Yeah. We're getting into the over an hour mark. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** Thank you for sticking around, listeners. We do want to share a few resources that led us to some of these things that we're trying. Lea, tackle the first one because this is what you've been doing a lot of.

**Lea Alcantara:** Right. Everything I'm going to say is really ask for advice.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** You need to ask for help. I know that's easier said than done. I did a multi-tiered approach. The first one is with asking for help, if you can get someone in person, take him out for lunch or coffee, do so.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Or go on video chat and ask and have a conversation. You'll be surprised at how helpful and heartening it is when people are candid about their perspective about business and running a digital agency and all that.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** That's a lot of investment of time, but I think it's a worthy, worthy investment. For less investment of time, but still like really great with that asking for help, if you are part of the Craft CMS community, really join the Shop Talk channel in Slack.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** It is just so, so great. It's like little bites of conversations. Sometimes, it snowballs and ton of people just put in their two cents, and sometimes it's just like "ask a question, get an answer" kind of thing and it's all specific to running a business.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And Emily, you'll agree with this, go to a business-specific conference like Owner Summit.

**Emily Lewis:** Owner Summit.

**Lea Alcantara:** And any of the Bureau of Digital events, we highly recommend that. That's, again, having that chat in person.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So if you can't think of a trusted colleague, there's a ton of new ones you can make at something like Owner Summit. And finally, like one thing that a lot of people forget is that there are business resources in your city.

**Emily Lewis:** That's right. Reuben and Sherri [Johnson] talked about that themselves once on our episode. They were on our show.

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**Lea Alcantara:** Yeah, absolutely, and I know Edmonton back when I lived in Canada had also small business resources.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Here in Seattle, I took advantage of Business Impact NW 3 business consultation. Their services are actually geared toward women in business as well as people of color and other marginalized communities like the LGBTQ community.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So it was like a great fit and free.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** And I sat with an adviser, a business adviser, someone trained in business, someone trained in sales, and he just listened and gave me critical feedback on questions I had about how I approach something, what my sales materials were, what could be improved.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I think it's important to get that type of advice from someone that isn't buried in the tech community.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So that you get kind of like an outsider perspective.

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**Emily Lewis:** Yeah, I agree with all of that. I wanted to just throw one more resource out there for anyone who wants help with management, whether it's people or operations, [askamanager.org](http://askamanager.org). It's a blog run by a woman named Alison Green, and she offers incredibly practical and timely, relevant advice. It's helped me in how I never kind of thought about how I manage things, I just did it, but now that I'm helping Lea with that, I need something formal and I need something that doesn't just work the way I work. It needs to work how Lea works.

**Lea Alcantara:** Right.

**Emily Lewis:** And so that's been really useful for me to think about different ways of managing, and it runs the gamut. I mean, I'm kind of addicted to advice columns anyways. [Laughs]

**Lea Alcantara:** [Laughs]

**Emily Lewis:** But you just see every business has challenges, every worker, every employee, every owner, and every manager.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And so this is not like the end of the world. It's just this is reality, and there's a path forward in all of those problems, so I love that blog.

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**Lea Alcantara:** Yeah, absolutely. All of this is in service of professional development, which means spend some time on professional development, like take courses and workshops.

**Emily Lewis:** [Agrees]

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**Lea Alcantara:** Like I'm taking a business Udemy writing course right now, and we kind of mentioned it earlier in the show, the red flags review. That was practically explained to us.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** The practicalities were explained to us when we attended a Louder Than Ten's PM & Sales Alignment Workshop, so something like that.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And of course, books, the one that really helped my sales process or at least reviewing our business was *Book Yourself Solid*, and that was actually recommended to me by the Chief Customer Officer at Pixel & Tonic, Leslie Camacho. He said, "If you are needing like more guidance over Step 1 to Step 2 about running a business, that's a good book to go through."

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And I've said this a million times, *Never Split the Difference* for negotiation.

**Emily Lewis:** [Laughs] Yeah. I'm not sure if I've mentioned this on the show. I know it was one of the books I recommended in our Owner Summit presentation, but *Extreme Ownership*. It's an extremely practical way to view ownership and what it really means to take a task from beginning to end and how to hold yourself accountable and hold others accountable or yourself accountable to others, so I think it's a great practical book. And don't forget, you can listen to our podcast for advice. [Laughs]

**Lea Alcantara:** [Laughs]

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**Emily Lewis:** So we've shared a bunch of stuff with you today, but we'll also link to a couple of episodes that stand out that we think are kind of relevant for when things aren't going so great, our [episode with Chris Harrison called Embrace the Suck](#), and our [episode with Erik Reagan, which is Success From Failure](#).

**Lea Alcantara:** Yeah, and we will link also to the article he wrote that is pretty much related to this as well.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** You know, at the end of the day, you need to put this advice to work.

**Emily Lewis:** Yeah.

**Lea Alcantara:** So don't just listen to this episode. This is something that I had to really work on, too, because like sometimes it feels like you've done something after listening to somebody, like listening to advice, chatting with people, but have you actually applied the information that you've gathered?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So make sure that whatever you glean, put processes and tasks into place so that it gets done and define goals and success in regards to that, but even if all that's said, take every piece of advice with a grain of salt, including this episode.

**Emily Lewis:** Yes, totally.

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**Lea Alcantara:** Because what makes someone successful doesn't necessarily translate one to one to your circumstance, and even in your own circumstance, because like certain things that work for us in the past doesn't necessarily mean we'll continue to work.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So just be thoughtful about what you incorporate for your specific needs.

**Emily Lewis:** And on that last point, make sure you're being honest with yourself about what those needs are that you're looking at reality and not just going based on how you hope things are going to go, but what the reality is today.

**Lea Alcantara:** Yeah, absolutely, and I think that's a good stopping point.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** We've covered a lot.

**Emily Lewis:** Yeah.

**Lea Alcantara:** And we're excited to get our listener's thoughts on this episode in our new #ctrlclickfan Slack for [our Patreon supporters](#).

[Music starts]

**Emily Lewis:** I'm super excited, and I think we'll probably talk about some of this a little bit more in our Year in Review episode, too, and maybe even a follow-up later next year once we kind of know what's working and what isn't.

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**Lea Alcantara:** I'm looking forward to it.

**Emily Lewis:** Totally.

**Lea Alcantara:** CTRL+CLICK is produced by [Bright Umbrella](#), a web services agency invested in education and social good. Today's podcast would not be possible without the support of this episode's sponsor! Many thanks to [Foster Made](#)!

**Emily Lewis:** We'd also like to thank our hosting partner: [Arcustech](#) as well as our listeners.

**Lea Alcantara:** And a special shout out to long-time listener and our first "View Network" patron, Mike Rogers. Whoohoo!

**Emily Lewis:** If you want to know more about CTRL+CLICK, make sure you follow us on Twitter and Instagram [@ctrlclickcast](#) or visit our website [ctrlclickcast.com](#). And speaking of our website, we really are finally launching a mobile-friendly experience next month, so stay tuned to Twitter and Instagram for news about our CTRL+CLICK refresh.

**Lea Alcantara:** And if you liked this episode, become a patron, so we can continue creating content you love — visit [patreon.com/ctrlclickcast](#). We can also use your reviews on [Stitcher](#) or [Apple Podcasts](#) or both! Links are in our show notes and on our site!

**Emily Lewis:** Don't forget to tune in to our next episode, our annual Year in Review, and our former intern, Erin, will be joining us again.

**Lea Alcantara:** Whoohoo!

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**Emily Lewis:** [Laughs] Be sure to check out [ctrlclickcast.com/schedule](https://ctrlclickcast.com/schedule) for more upcoming topics.

**Lea Alcantara:** This is Lea Alcantara ...

**Emily Lewis:** And Emily Lewis ...

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

**Emily Lewis:** Cheers!

[Music stops]

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