

Chapter 9 Worksheet: Calendar

If you already use a calendar program to track your meetings, gigs, and other obligations, you're halfway there. If not, find one. Google Calendar, Microsoft Outlook or Apple Calendar are all good candidates. You should be able to access your calendar from your phone and from any computer, anywhere. It should have the ability to remind you of upcoming items using an e-mail reminder and by sound notifications. We'll be using this calendar as the "master control" for many of your other systems, so make sure you have one you are happy with right from the beginning. Spend some time getting to know just how your calendar works. Make sure you know how to set up a reminder, recurring reminders, notifications, and tasks (your to-do list). Most current calendar programs work with current e-mail programs so that you can set up a task or calendar reminder just by saving an e-mail to the calendar. Learn as much about the capabilities of your calendar as you can, including how to access all of its abilities both from a computer and from your phone.

Worksheet: Mission Systems

Create a folder you can access from anywhere with a document that contains your current Mission Statement, Mantra, and Elevator Pitch. Each document should have today's date on it. Then set up a reminder in whatever calendar system you've decided to use. Whatever your system, make sure it will remind you once every three months to open and update your Mission Folder. Make sure you choose a time when you are actually likely to be able to take the time to do the work.

Worksheet: Team Building

Make a "Team" folder (note - I really recommend that you use a cloud-storage service like Dropbox™, Google Docs or something else that you can access from anywhere). List all your team members and their contact info, and a short paragraph on what each one does for you. Some of you may want separate documents or folders for each team member, for others just a single spreadsheet might do. Then set calendar reminders to be in contact with each team member on one particular day each month.



Worksheet: Create a “Goals & Strategies” folder.

Create a document listing your particular goals, and beneath each, your strategy (steps) for getting to the goal. I like to set this up in such a way that I can cross off steps as they get completed.

Set up a reminder in your calendar to go over your goals & strategies and update them once a week, or at least once every two weeks. As part of this review, you might want to schedule meetings with your team members to review current goals and strategies, and to create new ones.

Please take note: Your goals and strategies list is not the same as your daily “To do” list. That’s for when you are working “in” the business. The Goals & Strategies are for when you put on your CEO hat and work “on” the business, from that vantage point.

Worksheet: Set Up Your Finances

If you haven’t already set up your accounts in Quicken, QuickBooks, Wave Accounting or another system – do it now! If you have done that, now is the time to review and update it. Please note: This is probably a job you should plan to spend several hours on, especially if this is the first time you’ve set up books for a company. It’s not rocket science, but there will be something of a learning curve involved. Remember, the time you spend getting this right the first time will save you many times that amount of time as you go forward with your business.

Worksheet: Receipt Tracking

Set up your own receipt tracking system. Print the Out of Pocket Receipts (or not, if you choose not to use them), and gather your box, folder or whatever you want to use to organize the receipts in. Set your weekly reminder on your calendar for when you will do this each week.

Worksheet: Budgeting and Your Accounting Program

1. If you haven't done this, open up your *accounting program* (not a spreadsheet) and create a projected budget for the next month, or, better, the next three months. Use the help files and tutorial to learn how to set this up so that later on you can let the program compare it to your actual income and receipts for the period. Give yourself a calendar reminder to update this and check how you're doing once each month.

Note: This can be frustrating to get set up...it is, however, really worth it down the road, as it's one of the tools that will begin to give you a real handle on the cash flow of your business. I would recommend doing this on a different day than the one when you set up your categories and accounts, just to avoid burn-out. And, once again, remember that the time you spend now to get this set up will save you ten times that amount of time over the coming months and years.

2. If you've set your reminders for each of the above recurring financial tasks as you went, you're done with the set-up phase. If not: now go into your calendar and set recurring weekly reminders for all of the tasks we've covered with regard to finance. Set a weekly "pay bills" reminder and a weekly "check for funds due." Save bills you get (unless you've made all your bill-paying automatic) and pay them all when the "pay bills" reminder pings you. Set up your folder tracking all funds due—whether from pending gigs, sales, or otherwise—and when the task pings you, write e-mails or make phone calls reminding those who owe you that it's time to pay up! Finally, set a once-a-month date and time for "financial review." When that one comes up, if you've set all your other accounting systems correctly, you should be able to just open up your accounting program and check the "summary reports" to see your current balances, expenditures for the past month, income for the past month, as well as other interesting information. Do that, and then make any adjustments you need to in order to keep things on the track you've planned for yourself.

Worksheet: Legal Files

1. Set up yet another file folder—probably two folders, actually: one that's a paper file and one that's on your computer, and label it "Legal." Inside that folder have another folder labeled "Licenses & Permits." A second folder should be for "Insurance." If you have been diligent in protecting your intellectual property, you might also have a folder titled "Intellectual Property," containing copyright and trademark registration papers, as well as any correspondence connected with those things. Things like music licenses should also be there, as you may need to produce those for various venues where you perform.

2. Into these various folders go copies of all the materials that you would expect. Business licenses from state & city, fire permits, corporate papers and the like all go into the “Licenses & Permits.” All your insurance papers go into the second—you should have basic performer’s liability insurance, some form of Worker’s Compensation insurance unless your state allows you to waive this, and probably a general business “umbrella policy” to cover your costs to replace your props, costumes and equipment if they should be stolen or damaged.
3. Set up calendar reminders to renew all these documents in a timely fashion.
4. If you have a lawyer or other legal advisor, you should also remind yourself to set up regular review meetings with them.

Worksheet: Standard Agreements

Create a folder on your computer with blank contracts available. Make sure the blank standard agreement is saved in several different locations, so you can’t accidentally delete them all.

If you don’t already have a basic contract you use, now is the time to create one. You might have several: One for private parties and a different for corporate events, for example. You will find samples that can be adapted for your particular purposes back at the end of the chapter on Legal Considerations. The important thing is that you have blank versions readily available so that when a client is ready to sign, you can pull one up, fill in the blanks and send it off quickly.

Worksheet: Contacts

1. Put in a weekly reminder on your calendar to set aside one hour each week to maintain your contacts list. Give yourself a way to keep this systematic...maybe it’s chasing bounce notices from e-mail blasts, or maybe just covering the letters A & B this week, C & D next week, etc. Whatever works best for you.

1.1 You might want to take a few minutes and write up each step of this system (and all your systems, for that matter). That way, at some point, you can assign the update task to an assistant or virtual assistant. One of the marks of a really good system is that it can be operated by anyone, once it is set. Consider how to keep the process feeling human and personal as you write it up.

Worksheet: Prospecting

1. Write up your own system as succinctly as possible below.

2. Go ahead and set up those calendar reminders so you will actually start using the system you've just described!

Worksheet: Stay in Touch

1. Set up at least one system with which you will make contact with all of your past and potential clients at least once each month. Decide now what your first message to the list will be. Then set a recurring calendar reminder to yourself to prepare and send those regular mailings.

2. Figure out at least two or three ways that you will add contacts to your contact lists. My friend Jeff McBride takes a clipboard and pad to every engagement, and lets his audiences know, as part of his performance, that they can sign up to be on his mailing list. Every performance adds a couple of dozen potential new clients or fans. Your website should also have a button on each page which will link visitors to a sign-up page. Think of additional ways, and get whatever you need to implement those ways onto your calendar as reminders.

Worksheet: Social Media

In the last chapter, I already had you do some research and set up pages for yourself on the most appropriate social media platforms. Now go and explore the tools I've just suggested. Sign up for their free accounts, or, if one appeals to you more than the others, pay their minimum monthly fee, and start setting them up for automating posts to each of your pages.



Worksheet: Systems Set-up

1. Your assignment for this chapter is simply to go ahead and set up the various systems described. Even if you don't think you have a need for those systems right now, you'll be happy, when you do have the need—probably sooner than you expect. Keep the systems you create as simple as you can. Remember the purpose of the system is to make it easy and painless to accomplish the things you really need to do in a way that is excellent and that saves you time. Having the system written down or in your computer fixes it in place and time, and will make it possible to review and improve that system as you start to use it.
2. Once you've created all your systems, and put them into your calendar in a way that it will remind you when to use them, you're on your way. Make sure you set multiple reminders for each system task, and then get yourself into the habit of heeding those reminders and using the system when you're reminded. If you find the times you've set are inconvenient or difficult to stay with, change the timing. Some people like doing this work first this in the morning, others just before they go to bed. Whatever works for you will be the right choice for you.