

Coaching Transcript - Business Foundation & Strategic Planning

Jason: Hello and welcome to your first spotlight session, coaching session, session twice, but that's okay. This is Business Foundation and Strategic Planning. I'm Jason Zook. I'm in the striped shirt on the right.

Caroline: Caroline Zook. I'm in the blue sweater.

Jason: For those of you watching the replay, we actually already just did this.

Caroline: It happens to the best of us.

Jason: But the recording wasn't set up. So now we should be good to go.

Caroline: It's about the second time.

Jason: It was. We picked some other things we didn't set up. It doesn't matter. Let's move forward.

Caroline: Okay. So before we get started, allow us to introduce Spotlight Sessions. Who is excited? It's a new format for this year. This is a coaching format designed to help you get the best, most actionable info out of WAIM. Let's talk about what it's going to be like. So here's why we're switching it up. We know you signed up for WAIM Unlimited because you wanted help managing the overwhelm that comes from running an online business. We all know there's like

a million things to think of. There's a million paths to take, a million ways to grow, and so many aspects of business to learn about that it can feel like you're pulled in a million different directions, right? All the time. And that's why WAIM exists. But after three years of adding new deep dive topics every single month, we think it's time to focus on bringing the most potent, actionable advice to the surface. So our previous sessions, they'll always remain sort of this rich library of skills that you can dig into in order to support these more fundamental topics. So that's what the Spotlight Sessions are. And a good way to think about it is that your Spotlight Sessions are kind of like you're snorkeling, right? We're up at the surface and we're talking about the fundamentals. And then if you want to dive deeper, if you want to go deep on branding, you go for it. If you want to scuba dive right into email, quiz, all of that good stuff, you can, because those are what the past coaching sessions are all about.

Jason: I feel like you're doing a great job.

Caroline: Thank you.

Jason: OK.

Caroline: And we're just going to start things right off with a sneak peek. If you're curious about the topics that we have set aside for all of 2023, here are kind of the 12 fundamental Spotlight Sessions that we've outlined. These are subject to change.

Jason: In no particular order, the order might change. But these are your topics for 2023, which we've never really showed before the full year of coaching ideas.

Caroline: Exactly. We have Business Foundation and Strategic Planning. That's where you are. We have entrepreneurial mindset and personal growth. We have offers that sell. We have sales and launching. We have marketing and promotion. That is like all things marketing bridge every point of the customer journey, project planning and processes. We're going internal into the business. We have content creation. There's like a million things to talk about there. Right. There's email list building specifically because it's that important. We have branding and website. We have copywriting. There's a lot of writing that goes to online business. Live workshops, teaching curriculum, how to kind of structure information and then managing money.

Jason: Now, the interesting thing about these, if you take a look at them, we have done a coaching session on every single one of these before. So as we go through this year, the goal is not necessarily to teach you a bunch of new things on these sessions, because a lot of times what we have to do, which we're going to share more of throughout this entire coaching session is go back and do an audit of the things that you maybe did like, I don't know, five years ago, three years ago, even last year. But it's time to update them. It's time to change them. So with these sessions, we really want to distill that best information and then move you forward so that you can always be kind of changing your business.

Caroline: And again, the goal is like, you don't feel like there's now more things that you have to learn. It's like always coming back to those fundamentals. And I'm going to tell you, we even in doing this session.

Jason: Yeah.

Caroline: Jason and I looked at each other and we were like, great, we have a, we know what we need to do on our own business.

Jason: Also, how does anybody buy from us? Which we'll get to that slide where it will makes sense. Now that I'm saying that.

Caroline: OK, so the format is going to be a little bit different, but still a lot of your same sections are going to be here. So the main coaching part is going to have four parts, your explainer, your keys, your steps and your execution. OK, and so your explainer section, that's going to be the meat of it. It's going to be the core concepts, links to deeper dive resources. So any topic that we kind of skim over, we're going to give you resources that already exist in WAIM so you can make the most of what you're already paying for. You can go back to those coaching sessions or courses or anything.

Jason: Some of you are like, what is in WAIM?

Caroline: What is in WAIM?

Jason: That's what these coaching sessions are going to help you find.

Caroline: The keys are going to be your most important guiding principles to remember. This is something that I've always felt was a little bit light in our previous sessions. It's more of the mindset stuff. It's the coaching that you pay for, right? It's like, I know this already, but I just need a couple of quick reminders of how to stay in the right frame of mind to execute on all this. So part three is going to be your steps. We always like to turn whatever we teach you into action steps. And then part four is going to be execution. And so this is a new thing. We're going to dive deep into how we actually keep track of these things or execute on these things in Notion. Don't worry, you don't have to use Notion to benefit from this section. Whatever tool you use, it's

really about showing you like, OK, here's what we learned. Now, how do I keep track of that in my business? How do I actually make use of that? And that's what part four is. And then of course we have your old standards, your field notes and your Q&A.

Jason: Yeah, and if you don't know what field notes are, maybe this is the first coaching session you've ever showed up to. We show an experiment that we're working on in our businesses. Sometimes it's in our lives as well. But it's kind of like you're behind the scenes. This month we have three things in field notes to share with you. So this is like a jam-packed field notes, a very fun one to kick off the year. So stick around because again, coaching session, the spotlight part of it is about an hour of teaching and whatnot. And then field notes, I can say about an hour. You don't have to throw in 10 minutes. Also, maybe someone watches the replay in 1.2 and then it's like actually 40 minutes and then we're just throwing them off completely.

Caroline: Start talking 1.2.

Jason: Anyway, field notes is the second hour with the Q&A. So stick around for that. And then also there's something super fun at that time.

Caroline: Super fun. Now what about workbooks? Yes, of course, we have workbooks for the spotlight sessions, our usual Notion format and Google Doc format as well. What I like about these is they're a little bit quicker and then they're going to link to previous workbooks throughout, which you'll see. So if we've already done the exercise in a previous workbook, I linked to that in there. And then the idea is like, especially if you're one of the ones who uses Notion, pull like fill this out, but pull some of it into your existing system so that these don't just like sit on a shelf, but they're like integrated into your system. And always in the execution section of the workbook, I have tips on how to kind of pull it into your existing system so that all

of this is top of mind. Cool. So we hope spotlight sessions offer you clarity. Our goal is that you come here once a month, you spend time with us and you walk away feeling more clear and confident about how to move your business forward.

Jason: Yay, us! And we hope you're enjoying the new design of these coaching sessions as well, our new branding, which is very fun. OK, so this is I've alluded to this multiple times, but it is worth sticking around for.

Caroline: Yeah.

Jason: This I just can't wait. I'm not going to say a lot about it because I'm not supposed to.

Caroline: You're over selling it.

Jason: I'm not over selling it. I'm underselling it, honestly. This is super fun. It's a little bit ridiculous. We used some AI as well, which is we're going to share about. But stick around for after the whole spotlight session part, when we get into field notes and whatnot, you're going to hear about this. We're not going to tell you what this is right now.

Caroline: That's right.

Jason: Yeah.

Caroline: As usual, we need to go over our community values and there are four community values that we try to uphold and new year, same values. Inclusivity. We welcome and celebrate people of every race, ethnicity, gender or non-gender, sexuality, mental, physical, intellectual

and sensory disability, neurodiversity, body size or hair length or lack thereof. We aim to continue educating ourselves and each other on ways to intentionally cultivate a space where everyone feels seen, supported and celebrated. You'll also notice we have these little kind of value stickers that are throughout the presentation. So we're all about celebrating uniqueness.

Jason: I can't wait till I have a full sash with those on it.

Caroline: I know, like merit badges.

Jason: That'd be fun.

Caroline: Second value, mutual respect. We are all on the same level in WAIM, regardless of experience level, figs status, how many figs your business makes, or knowledge. So we don't want to talk down to each other. We aim to maintain a level of mutual understanding and respect while also remaining open to feedback and help without defensiveness. Third value, vulnerability. We champion being open and real in this community. This isn't a place for pretending we have it all together. If you have to redo the beginning of a coaching presentation, that's fine. With that, it's important to also practice receiving someone's courageous vulnerability with warmth, compassion and understanding. We love this about you all. And then lastly, listening and tactful feedback. We support each other by offering feedback when asked, but we deliver that feedback in a way that is constructive, tactful and compassionate. We also commit to really listen to each other for what help and support is being sought rather than just me jerk reacting with our two cents. You know, in text, sometimes context can get lost. So we try to be kind. And then finally, when something has been done or said inside WAIM that has brought harm to you, this is how you can bring that feedback to us to make it right so that we can learn

and move forward in a better way. And that always lives at wanderingaimfully.com/repair. So that's where you go for that. And that concludes the intro.

Jason: Fantastic. Great job. I know some of you were asking about the workbook links. You can find those in your email inbox of the email that came out yesterday. It's also on Slack as well. Or maybe someone will post them in the chat for those of you who are here live. Katherine just, Katherine, fantastic job. Those are the workbooks that we have for you for this coaching session. And again, they're always emailed to you the day before and they're always in Slack as well for you to refer back to them.

Caroline: We are mostly on time. We have to make up about two minutes, but I think that's doable.

Jason: I can speak at 2x. So that... Excuse you. Excuse you. Excuse you. Thank you. So this is part one, the explainer. Let's walk through a refresher on what we mean when we say your business foundation and strategic planning.

Caroline: Let's do it.

Jason: When you take the time to get crystal clear on the foundation of your business, everything else becomes easier. What your business does, how it makes money, who you're talking to, how you might connect with them and what your ultimate goals are. These are questions that need to be defined and redefined as time goes on to move forward confidently. And this is something that we had some eye opener for when we were going through this ourselves. Before we get started, though, there is an age old battle that we would like to maybe

just settle in our own little way here. And that is this idea of, do I go niche, or do I go generalist in my business?

Caroline: Because I'm sure all of you have heard the advice of when it comes to business like niche down, niche down, niche down. And we often talk about, you know, we think of ourselves as more of sort of a generalist business. But we want to talk about, I think this is a good time in this section to reevaluate, do you think of your business as more of a general business or more of a general business?

Jason: Exactly. Now, generalist versus niche, we're going to go over these and we're going to do a little bit of pros and cons. One is not better or worse, it's up to you to decide what pros you want and what cons you're willing to stomach because every single type of business, every single way of running a business, anything in business has cons to it. So it's about just acknowledging what you're willing to work with. Is there a holla atcha keyboard in this?

Caroline: Yeah.

Jason: That's what I thought.

Jason: For the generalist.

Caroline: Oh, on this slide?

Jason: Yeah.

Caroline: No. But we can do one.

Jason: Okay. Very quickly, holla atcha keyboard if you're here live, just because it's always fun to do this. Do you feel like your business fits more in the niche or in the generalist category? Just curious for those of you who are here, I would imagine it's probably more of like a 50-50. Yeah, that's what it's looking like a good amount. And again, not saying one is better than the other. And we're going to go over kind of our journey here. But yeah, fun to see. Thanks, everybody. Okay, so the pros of running a generalist strategic business, if you will, exploring multiple interests, having more freedom, and then getting started without knowing your direction.

Caroline: Yeah, I mean, when you run a general business, you have more freedom to explore different topics and talk about different things and really explore your interests. And I think especially when you're getting things off the ground, and you're not sure who you're talking to or what you want your business to be, that's a pro of going a more general direction.

Jason: I would say if your business name is Jason Does Stuff.

Caroline: That was very general.

Jason: Probably in the general.

Caroline: Very general.

Jason: Now the cons of being a generalist, which I was very much aware of during this, it's harder and longer to build an audience.

Caroline: And we talked about that.

Jason: It's less magnetizing. So you're not going to necessarily attract someone for a specific thing.

Caroline: Because someone doesn't arrive on your site and go, oh, they're definitely talking to me because it's like, oh, they're talking about basketball and online business and cookies.

Jason: Yeah. And then selling can be harder because you're going to have an audience of some size, but not all of those people are going to maybe be there for that one thing that you're trying to sell. Now for a niche business, the pros, messaging is easier to define. There are some definite SEO benefits in the content that you create because it's a lot more narrow and a lot more focused. It's faster to make money and build expertise. Even though I know for some of you, you may be saying, say that to my bank account, we know that same feeling, we understand that you just picking a niche doesn't mean you're going to make money, but it is the faster way if you're going to choose between the two. Now the cons are it can get boring to run a niche business because as someone who did that with my get sponsorships business and the sponsorships course, boy, was that boring to talk about after a couple of years.

Caroline: If you're someone who likes novelty. Yeah.

Jason: It's going to be...

Caroline: Now if you really love your niche topic, then maybe you never get bored.

Jason: And if you're running a niche business, it can be harder to pivot. So it can feel like, oh, I've built my brand around being X and I'm afraid that I'm not going to be able to move into

something else. A lot of that is just your own kind of like perception and fear, because really like you can change anything at any time. Like we're not etching things in stone here. A lot of the stuff we're doing is all digital and can be changed and updated. In reality, though, it's not either or it exists on a spectrum.

Caroline: And this is what a lot of you were saying in the chat, which is, oh, I'm niche-ish or I'm general-ish. And that's the thing, right? It really, the ish is the emphasis here. It's a spectrum. It's not just either or.

Jason: Cool. You want to take them through our spectrum?

Caroline: Yeah. So this is what our journey has looked like. And I just thought this would be helpful to see. Over time, we have shifted from general to more niche and back to general. So in the beginning, I would say we definitely were more general, especially when we had our individual audiences. I mean, at one point I'm talking to hand letterers, I'm talking to brand, like to small businesses. I'm talking to people who want to be designers. I had lots of audiences, lots of benefits. And then there came a point where we definitely niched down, like even for Made Vibrant, when I narrowed down into, I do brand design for solopreneurs. That's what I did. That's when I really saw that service business kind of explode was when I niched down. And then once I did that, I said, oh, well, you know, it's a little limiting and maybe I want to open things back up again. And then when Jason and I came together and we did Wandering Aimfully, I switched to digital products. Jason got bored with doing sponsorships. So we both kind of broadened it back up and then we came together to form WAIM and we just sort of said, okay, let's just do online business owners. And it's taken us a while to find our niche-ish section of just online business owners. And we're tightening it even more. Like you'll see, we'll share with you throughout this presentation that this year we kind of want to even niche down a little bit more into a specific

segment of online business owners, which we'll share with you. But this is kind of what the journey is. It's not either or. And so we would recommend though, if you're like, well, where does that leave me? Where should I be on that spectrum? We would say if you need cash faster, or if you're not seeing results with what you're doing, or if you find yourself often confused by your own business foundation, like you're talking to three different audiences, maybe consider finally going a little bit more niche and making 2023 the year that you niche down a little bit. Right? But if you feel stifled or bored with your own constraints, if you feel like you've saturated your niche, if you aren't sure yet which of your interests has profit potential because you're in the beginning, maybe go more general. And this is kind of where I would say to land on both of those things. If you're someone who doesn't really know where you fit in that.

Jason: Cool. So what if you're transitioning between two audiences? So maybe you're someone who is generalist so you're going to niche, or maybe you're someone who's niche so you're going to go generalist. This could be from a more general audience to a new niche. It could be changing niches, or it could be opening up your niche to more general topics that could have been opening up your niche to more niches, but that would have been a lot of niches in one sentence.

Caroline: Niche within a niche.

Jason: This is hard because you may still need revenue from your old audience while you build your new one. So be strategic about which channels most contribute to sales from your older audience and transition those last.

Caroline: I know a lot of you often share this and you say, I'm sort of stuck between two worlds. And I don't know if anyone in the chat can relate to this, but you're always asking, how do I

strategically make that pivot? And I think this is a good tip, which is just think about your channels individually and try to pivot one at a time. And so if there's one that actually you need to pull revenue from, clients or whatnot, start with the ones that are less revenue dependent and try to shift that audience first to kind of like think of it like a stepping stone. You got one foot in the new world, one foot in the world that still brings you money.

Jason: Congratulations. You're straddling worlds. For your business foundation and four Q's, which we're going to get to in a moment, you may benefit from doing the exercise twice. So once for where you are right now and once for where you want to be, this will help you see where you need to bridge the gap in communication so you can see what your needs change. So speaking of the four Q's, you may have heard us talk about this before. Funny enough, this is in our very first pre-coaching session coaching session. We go over this. These are something that we try to come back to often. But even in doing this exercise, you're going to see we have done a bad job of like moving them forward with our business as we've evolved. So we're going to share more of that.

Caroline: Which is why you re-audit them, right?

Jason: Yes. All right. So for the four Q's, you're going to start with four questions, but really it leads to seven crucial pieces of your brand story. And there's lots of actionable items here for this. But the four Q's are who, this is your ideal audience. Why, your purpose, your mission, your differentiator. What, your benefit and your transformation and four, the how, your core offer. So these are the four Q's.

Caroline: Let's dig in.

Jason: It's still me. We know it probably feels... I know you want to read all these slides and you really want to get into it, but you just need to hold your horses and not the horses that Penny's talking about because Penny has a fantastic niche, which is horse midlife, horse, horse-ry, equestrianism? We were talking about this the other day and it was very silly because we don't know anything about horses. Yeah, we know it probably feels like you've done this a hundred times answering these questions. But when was the last time you audited these pieces of your brand story? So holla atcha keyboard, when was the last time you sat down and answered a version of like the four Q's of your business? So who your ideal audience member is, the transformation that you're making for them, what your exact core product is.

Caroline: We do it about once a year, but we didn't do it last year, probably because we were like, whatever we are doing, we have to keep it. Two years is the last time we really did it.

Jason: Some people are more recent, but some people are like a year ago. Some people kind of do it every couple of years. Yeah. Yeah. So for us, and you're going to see our example through this, it's very interesting the longer that you go between kind of doing this audit, which is why we think this is a great coaching session to start with, because whether you're far along and you have a business, you've been doing things for years like we are, we still go through this and go, oh, but our audience has changed and our core offering has changed and how it helps people has changed. But we haven't reflected that change in so many places. So great. Thanks for participating. So trust us. There is so much value in coming back to these cues regularly. The effectiveness of your strategy lies in how clearly you can answer these questions. Carol, we're here for more.

Caroline: Now I get to dive in. Okay. So again, we know you've probably done this before, but this is your chance to recommit to doing this exercise and getting as crystal clear as you can. So

let's start with that first Q being who. And so this is going to be, who are you talking to? So who is your audience? Who are you ideally trying to attract? And this exercise is especially crucial to come back to often. I think this is the one that you have to come back to the most often. And as we've touched on many times, we're still shifting this and honing our audience and deciding to niche it down more. And we'll share that in a sec. But the questions you want to answer are, what do they do for a living? What do they care about? How would you pick them out of a crowd? What problems or pain points are they facing? What do they dislike about the status quo in your industry? I feel like that's one that maybe is like a new question we haven't done before. But the more specific you can get about who this person is, what they believe, what they're struggling with like that is going to be such fertile ground for all of your copywriting, your website, communications, all of it. So that's who. Now moving on to our second Q being why. And we've broken the why out into these three different pieces. Again, because all of these pieces, I think, are crucial in different ways. So your mission is why does your business exist? Or what is the deeper cause or your driving belief? And so the way that I want to differentiate between a couple of these whys are this mission is something for external use. It's something that you could write on your website that your customer would really connect to emotionally. And it really comes back to that TED Talk that I'm sure you've heard or seen it before, which is Simon Sinek talking about the golden circle. And people don't buy what you do. They buy why you do it. And the entire TED Talk is about this idea. But your mission is really just something bigger than yourself that your customer can relate to, to understand like why they should care about your business. And so the question you want to answer is how does your business connect to the world at large? That's kind of your mission. What belief or idea does your business represent that you feel is worth spreading? And again, all of these little bullet points are in your workbook as just kind of triggers for you to formulate this.

Jason: And we'll give you our examples too, so you can see like a real time sample.

Caroline: And we'll give you examples, but there's no right or wrong way to write any of this. It's just really a prompt for you to kind of craft your own messaging that you're going to put throughout all of your marketing communications.

Jason: Now you have a bunch of reading coming up, so I'm going to take the next couple because got to give you a break. So the next part of why is your differentiator. So why would your customer choose your business over another in your niche? Maybe you're un-boring. This is also for external use, something you want your customer to be able to clearly identify.

Caroline: So like those Zooks, they're pretty weird.

Jason: They're super weird, but I like learning from them.

Caroline: They talk about enough a lot.

Jason: It's often something in your values, your way of operating, your tone, your beliefs, your personality or your process. So if you want to own your weird, it's one of those areas that comes up. What sets you apart? What makes you unique? So that's the other part of the why. And then your purpose is the third part of the why.

Caroline: You got it.

Jason: Why are you excited to get up in the morning and work on this business? This is for internal use. So no one needs to know about this but you. Sometimes this can match your mission, but not always. And this might be a more selfish angle because you want financial

freedom because it makes you happy because you want a better life for your kids than you had. Any of these things are what really drive your purpose.

Caroline: You can be like, because this is your own thing. You can be like, I get up in the morning to work on my business because I have a chip on my shoulder and I want to prove my third grade teacher wrong. We're not going to judge whatever your purpose is, but it's the thing that can kind of be that spark that you can come back to. Sometimes your why can be that greater purpose, your mission. Maybe it's the same. You really want to make an impact on the world and that gets you out of bed in the morning to work on this business. Great. But I also wanted to include this because I don't think people often talk about the fact that sometimes your purpose can be just something that nobody else understands. And it can be as simple as like, I love making things. And so when I get out of bed in the morning, I want to get up and work on my business because I love making things.

Jason: All right. Let's move into the what. So this is your benefit. We love this little metaphor. What benefit does your business provide your ideal audience? So think about Super Mario. Everyone knows Super Mario. Your customer is Mario. Your offer is the mushroom.

Caroline: This is not, by the way, a concept that we came up with. This is a well-known marketing concept and I wish I had put the credit there, but you can look it up. Look up benefit Super Mario and you'll get it.

Jason: With your mushroom, which is a reminder, your offer, your customer becomes Super Mario with your help. So he goes from little baby Mario to Super Mario. My favorite is the one with the tail where he can fly. That's my favorite. What does that mushroom do for them? Does it give them confidence, clarity, better test scores, job opportunities? Does it save them time,

money and headaches? So this is the benefit. This is not just I sell an online course about learning Squarespace. It's I'm going to help you get more people signing up for your yoga studio through your website. Like that's the benefit that you're going to get from having that well-designed Squarespace site. Now your transformation. What transformation does your business help your customer undergo? You can take this.

Caroline: Oh, thank you.

Jason: Yeah, I know.

Caroline: So can you clearly define point A where they are when they come to you and point B where you take them to with your services, your products, your offer? Right. This is about defining your version of what Super Mario looks like for your customer after they take the mushroom. So the mushroom is sort of like, okay, they get faster, they get stronger. And then the transformation is like, okay, what are all the things they can do now that they're faster and stronger? Right. Again, these are just metaphors, but that's how those two things are different. They're very much in the same, but it just gives you two different ways of talking about the problems that your business solves, the things that your customer is going to gain by buying from you. And these are going to give you again, many, many things to pull from when it comes to building your brand story. So how is their life better after your offer? What has changed for them?

Jason: Pre-mushroom, post-mushroom. Love it, Meg.

Caroline: Yeah, exactly. Then finally, the how. How do you deliver the benefit to your customer? This just really comes down to your core offer. What is your business's core offer? If someone

asked you, what does your business sell? You had to answer it in 10 seconds, what would you say? It's okay if you have a whole slew, if you have an offer suite. But the reason, if you have more than one offer, can you either pick one that is a primary focus or summarize them into a category? Like online courses or digital planning products, like is there a 10 second version that you could come up with instead of listing out all your offers? And that's going to help you when it comes time to writing those marketing communications or putting it on your website or something, like kind of giving yourself a category. So at a glance, someone goes, oh, I know what they sell.

Jason: Great.

Caroline: Great. So all together now, we're going to give you examples just to help you. So you have things to pull from, and these are in the workbook as well. But if we were answering this, and really specifically, if I was answering this, all of these seven brand story bits for ourselves, for our audience, I would say we help intentional online business owners who want to transition from client work to selling digital products. And if you're like, it's not me.

Jason: Everybody in the chat who is a client service business owner right now doing client work that wants to transition to digital products, please say that's me or it's me in the chat. Cause I'm curious how many of you, like we're going through this process now of really reflecting on like who are WAIMers? You know, like we know who you are and we know what you stand for, a lot of you, but just in the chat right now, it's the majority of you. And this is what we've realized. We have not put on our website and in our copy and in anything anywhere.

Caroline: Yeah. And it's okay if that, again, I'm going to say this at the end, but as you clarify these things, it's okay if your business doesn't like sort of reflect these answers right now, this is

about giving yourself a direction where you want to head, right? So we talked to intentional online business owners, like everyone for a few years. And that was even, you know, that was a little niche because we're not talking to all business owners or people who want to grow to a multimillion dollar businesses, but this gives us like sort of a direction that is a little bit more niche. For mission. So to give more people all over the world, the opportunity to work with more flexibility and freedom leading to more satisfying, peaceful lives. If we had to narrow it down to how we think that that makes the world a better place, that's what it is.

Jason: Yeah.

Caroline: You're differentiator, we're un-boring.

Jason: Hopefully.

Caroline: We don't sell false promises. We encourage people to aim for enough as an antidote to burnout and to do it their way rather than chasing external validation. So those are some ways that we kind of like carve out our own space. And then for me personally, your purpose, my life changed for the better once I was able to work in a way that didn't damage my mental health, every person deserves to feel this and I want to offer it to as many people as possible. I wake up in the morning and that's what I think about. That's what makes me want to do coaching sessions. That's what makes me want to work on the business is like, I want everyone to feel the flexibility that I feel in my life because I think it's that important. Your benefit, we offer business owners, clarity, connection, and focus. By highlighting one thing to focus on each month and offering an encouraging community, WAIMers can make progress without the pitfalls of overwhelm, comparison, and burnout. Those are all of our mushrooms.

Jason: Yeah.

Caroline: And then our transformation is we take people who are stuck trading time for money and overwhelmed with how to build a one-to-many audience and we give them a path to a predictable, thriving digital products business. Again, whether we do that well or not right now, that's what we're aiming for. Okay. And then finally, our core offer is WAIM Unlimited, a monthly coaching program that includes live training sessions, self-paced courses, software, and a community.

Jason: Great. Cool.

Caroline: Again, remember it's okay if your current business does not reflect these statements exactly. The first step is to write it down. The second is to mold your business toward these statements.

Jason: And hopefully reading our examples, because it really helps me. Like when I get those big questions for like the who, the what, the why, the how, I just get so overwhelmed. And I'm like, this is too big of a question. But then seeing the examples that we just gave you from WAIM, I hope it helps you because it helps me. Like it helps me read it and be like, oh, okay, great. Like I would now know how to answer this question for, I mean, it's our business, but like if I was somebody else reading this, I'd be like, okay, that's helpful because that's kind of what I want to do, but I want to change it to fit my own niche.

Caroline: Definitely. All right. So we've gotten some clarity on key parts of your business.

Jason: Yes.

Caroline: But what do we do with this?

Jason: Well, we do a right leg stanky leg is what this looks like.

Caroline: So the thing is you want to use these brand story bits all throughout your communications, your website, your social profiles, your email headers, your sales pages, everywhere your potential customer sees is a chance to be clear about these things. So shout out to WAIMers. Some of you are like, I didn't know I was going to be in this, but it's okay.

Jason: You're famous. Basically you're famous.

Caroline: Erika.

Jason: Congratulations.

Caroline: You're famous.

Caroline: But I just wanted to pull some examples so that you actually know what we mean when we say that. So like a social profile, right? Like I draw cute character, watercolor illustrations. I teach you how to do the same thing. Create a calm corner of your life. I love that because that's a benefit, right? Like that's the mushroom or the transformation. You could argue either, but this is where you're putting that stuff. And it doesn't matter what format you're doing that in. It's just think of each one of those seven things as little building blocks that you can combine and write and be clever and put it different places.

Jason: So, oh, I was gonna ask you to click into Erika's story and then we could all awkwardly look at Erika's story that she posted on Instagram together. It's like a group of parents. We can't do that because it's a screenshot, but it just thought it'd be funny.

Caroline: Over to WAIMer, Dani Ives's website, again, right at the top for her course, learn the needle felting skills to confidently create anything, no stress, just creativity.

Jason: Love the no stress, just creativity because it's so easy to say for a creative business, let's all be creative. But I think there's something that like actually anchors it to like, oh, I get stressed out when I'm doing creative things. I'm like this, this might be a course for me that actually changes that.

Caroline: And in a second, we'll talk about like tagline, which is like another kind of format to use. And so no stress, just creativity kind of works there. But also identifying your core offer was a part of our seven bits as well. And so now we can say, oh, she does courses and she sells art.

Jason: Yeah.

Caroline: Boom. So writing and designing every aspect of your brand will be easier when you have these seven pieces as your raw materials, which is what we've been talking about.

Jason: Yes.

Caroline: So the action step is to use your answers to evaluate your communication. So I'm going to quickly go through these. But Jason and I wrote this checklist. These checklists are in your workbook, but...

Jason: I'd be so excited, by the way. I think this is a spoiler alert for the wall of fame task that I'm going to post in Slack next week for you to get credit on the wall of fame, which if you don't know what that is, we'll get to it later. This checklist is going to be the wall of fame task already because we did it. And I'm not going to say I'm embarrassed by our results, but it is just laughable when like we're the folks who are supposed to be teaching you the things. But like we even need to do these things, which is, again, the whole point of this entire year of spotlight sessions is this slide once it finishes.

Caroline: Yep. Okay. So for your audience, some simple questions, is your content speaking to this person? For us, because we're kind of shifting our audience into a more niche. I'm going to say no. Our new project, Narticles, which we'll discuss is part of the reason for this. Is your website speaking to this person? I'm also going to give us a no on that one because again, it's new.

Jason: We're not doing great.

Caroline: We're not doing great. Is your email lead strategy attracting this person? Again, no. And I see those three X's and I go, that's three different opportunities that we have in order to improve our business. And I hope that you feel the same when you do this checklist is like, oh my gosh, so many opportunities. So for our mission, is your mission anywhere on your website or offer sales page? I would say no.

Jason: No, not really.

Caroline: But do you ever speak about it in your content? I would say yes. We talk about our mission.

Jason: Good job us. We got our first check mark.

Caroline: Your differentiator. This is where we really excel. Does your branding and design reflect or represent your differentiator? I think so. I think our use of emojis alone does. Do you ever make it clear in your copy how you're different from your peers? Yes, we do. This is one that I think we get pass with flying colors. For my purpose specifically, do you have this written down somewhere that you can come back to daily or weekly to get inspired? No, that's a silly thing that I should do.

Jason: Absolutely.

Caroline: I think about it, but I don't have written down.

Jason: We have three out of eight on that slide. Three out of eight. Not great. A lot of room for improvement. So much stuff we can do.

Caroline: For our benefit. Is this front and center on our website? I think so. I think we do a pretty good job of saying what are the benefit of WAIM Unlimited is. It's also on our sales page and in our sales emails, we get an A+ on benefit as well.

Jason: I'm feeling good.

Caroline: Mentioned in our social media.

Jason: We don't use social media like we used to.

Caroline: But we used to.

Jason: We need a checkmark. Okay? Leave us alone.

Caroline: Our transformation. Is this explicitly shared on your sales page? No, we can do a better job.

Jason: And especially because, again, we're going to be in a little bit of a transition period with again, as I just asked you a moment ago, are you a client service person who wants to move to digital products? And again, in that question, I was not asking you to never work with clients again. And that's not what we want people to have to think they have to do. But as we move that forward as our focus on who our audience is, it is not on our sales page. It is not in our sales emails. It is not in our testimonials. And so we know that's a great opportunity for us to bring that in because clearly our customers are those people. So we need to have other people who might be future WAIMers understand that they're going to be in the right place.

Caroline: But we get, oh, we get an X on our core offer only because we went to our home page. We were like, it's not that clear what we sell.

Jason: This is a very funny moment about an hour, two hours ago when Caroline was looking at our website and then looked back at me and she was like, how would someone know that we sell WAIM Unlimited on our website? And we were looking at it and I was like, it's in the join button in the top. And she's like, there's no join button. Didn't even realize it.

Caroline: We took it off a while ago.

Jason: We're the worst.

Caroline: Come back to it.

Jason: Yeah.

Caroline: And that's that.

Jason: It's also a great example. Like you can still run a business doing all of these things incorrectly. And it's just, it's not like a you're doing it wrong. It's just lots of room to do it better.

Caroline: I hope that we are perfect examples of why you shouldn't be perfectionistic about any of this stuff, because we were kind of halfway on a lot of these things and we still have a thriving business. Like it's OK. It's just it's all room for improvement. Right. But these this checklist right here is 16 individual ways that you can strengthen your brand foundation starting today. And these are all listed in your spotlight sessions workbook under each of the bits. And so it's right here. The little audit checklist. So you could pull those all into. Well, you could keep it here or pull it into a task list if you wanted to. Which is like, that's amazing. If you walk away from the session with only those 16 action items, that's fantastic.

Jason: Yeah.

Caroline: A couple of little quick wins for better, more confident brand messaging.

Jason: I would love some quick wins.

Caroline: These are things we've talked about before, but ways that you can kind of combine all of these things into like little snippets, brand messaging snippets. You have your biz bio, your two word tango, your party intro and your tagline.

Jason: Yes.

Caroline: And so your biz bio is sort of the format of like this is like a more formal version of like I help blank, achieve blank by doing blank. Right. Your two word tango. We've talked about this many times. This is sort of like the mental bucket that someone would be able to put you in. It's like a category.

Jason: And the thing I always want to say about the two word tango. This is not something that you have to use all the time, but it's something you should use prominently. So very quickly, someone can acknowledge this is what you do. It's like the place where they put you in their brain. Because if you say like, I'm a website crafting wizard, someone's like, I don't know what that means. You're like, I'm a Squarespace designer. Okay, I get it. Like that's what it means.

Caroline: Yeah. Your two word tango is not going to feel clever or creative and that's okay. That's not the purpose of it. This one though, can be more of your, what did you say? Website crafting wizard.

Jason: Yeah, absolutely. Like make it mysterious, make it fun.

Caroline: Your party intro is like a little bit more mysterious. It's like maybe when you meet someone at a networking event, you really want to invite questions. And then your tagline could be a memorable phrase or statement that you want your customer to associate with your brand. And so these, just as an example, the Biz Bio version would be, I help intentional online business owners transition from clients to a digital products business through an un-boring monthly coaching program called WAIM Unlimited. Yes, it sounds formal, but like if I want to give people all the bits in one sentence, perfect. I can use that for my professional bio. I can use it on my about page, something like that. My two word tango, I'm a business coach.

Jason: Straight up. I don't want to, I don't want to say that to people, but I want to make sure that it's known very clearly. Oh, that's a business coach. Great.

Caroline: Yep. My party intro, I might say something like we help online business owners define how much is enough. And people are like, what do you think? How much is enough?

Jason: Come to our party and drink some of our Kool-Aid. We have lots of Kool-Aid.

Caroline: And then they ask questions and then I get to answer them.

Jason: Don't worry. It's gluten free Kool-Aid.

Caroline: And then we are testing out some different taglines, but one recently that we've come up with is just grow your business, shrink your stress. We're trying that out. We're trying it out. See how it feels.

Jason: As a live quick workshop here for everybody who's here. What do you think about the tagline? Grow your business.

Caroline: Shrink your stress.

Jason: Shrink your stress. You can say it's crap. I won't be offended.

Caroline: You guys are so affirming and I love that. We're 10 minutes behind. I'm not pressed out at all.

Jason: I just ignored.

Caroline: It's our business. So the point is you decide when and where you want to use these different variations, but go back to your seven brand story points every time you write communications for your business. When you write a sales page, when you redo your website, when you do an email course, like go back to those seven bits and be like, is this in alignment with those seven bits that I already decided were my foundation? And then if you want to dive deeper on any of these topics...

Jason: We just snorkeled.

Caroline: We snorkeled. And if you're ready to scuba dive, feel free to check out the four Q's coaching intro session. So you can find that in the coaching hub or you can just go directly. All the URLs are the ones in blue. So screenshot this side slide, do whatever you need to do. We have that short video. That's like all about the four Q's. We go over the four Q's in every single

Unsolved Business session. So definitely check those out. And then finally, if you really want to dive into brand story, check out module one of Better Branding Course.

Jason: Cool.

Jason: Great.

Caroline: Great. Foundation, strengthened.

Jason: Now let's shift over to goal setting and strategic planning. You define your own success. As a reminder, we are big believers in working to live, not living to work. What exactly does that phrase mean? It means using your business as a tool to live a good life however you define that. So again, we'd like to put our lives first. Take a second to imagine the life that you're aiming for. You might be a cat basking in the sun.

Caroline: And you want to... we want to get you there.

Jason: We want you to get so much. I really do want you to be a cat. Close your eyes and really imagine it. Jot down some things that come to mind. This is just one of those things where you just like take a second and you think about for you. Not like societal, not social media, not what you see on YouTube that gets fed to you. It's like, no, no. What does it really matter for me?

Caroline: I was imagining.

Jason: Great. And if anybody wants to be a cat, let us know. We'll help you out. Now we want to talk about defining how much it will take to get there. So we're going to do this in two ways. You

have your MMM number and you have your enough number. Your MMM number is stands for monthly minimum magic number. And you may have heard us talk about this before, but we always come back around to it, your MMM number. So your MMM number is the amount of money your business needs to make each month for you to cover your bills at your current lifestyle. So just like you're covered in the bare bones of things, you're making all the bills get paid, but you're not necessarily doing a lot of extra. That's OK.

Caroline: More spaciousness or the money that you need to become a cat.

Jason: Yeah, we will get you just wait. We will get you there to being a cat. Your monthly minimum magic number should feel realistic. And maybe you're very close to it. Maybe you're at it right now. Maybe you need to go through your expenses, which we're going to show you an example of. There's also a thing in your workbook. This is something you should definitely be looking at over time. And then your enough number. This is the amount of money your biz would need to make each month for you to live a wildly spacious and ideal life. You're a cat, whatever that looks like for you as a cat. Okay, that's the difference. This feels ideal. And again, your enough number might change over time. Like our enough number changed from what we said at the beginning of Wandering Aimfully to then achieving it. And now we are changing it again, not because we just want to keep moving the goalpost forward, but because our goals have changed in life. And so now we're reprioritizing what that means.

Caroline: We'll talk about that in the execution section.

Jason: Yeah. So ask yourself which one of these you're aiming for, because you may be just in a monthly or an MMM number time in your life, you may be in enough numbers time in your life. And that's okay. If you want to dive deeper, we have resources. Again, that was the snorkel of

that. And we have a couple more things on it later. But we talked more about your enough and MMM numbers and your finances in the Reflect and Project 2.0 coaching session and the Budgeting for Debt Payoff coaching session. And there's also an article. I don't know if you all have ever seen this wanderingaimfully.com/enough, where we break down the MMM number and the enough number. It's like halfway through the article with some examples.

Caroline: Yeah, if you want to know more, definitely screenshot this slide. Because that's where we really break it down of like how to define your both of those numbers.

Jason: Cool. So let's do a little example here.

Caroline: So once you have your monthly number after you've done those scuba resources, and you've set it, we're going to get into offer math.

Jason: Yes.

Caroline: Yes. Okay. So really this breaks down to taking your number or enough number and reverse engineering your total number of sales needed to get there. And then you're going to play around with different pricing, different revenue structures and launch strategies in order to see this is what I need to do in order to get to that MMM number or enough number. We'll just call it your goal number.

Jason: Yeah.

Caroline: Use the math to consider new revenue opportunities. This is when you're also going to start to see, okay, maybe some of these revenue streams are not going to get me to my goals.

What are some ideas of ways that I can get there? So let's use an example. Let's say that your enough number is just again, as an example, \$8,000 per month, right? \$8,000 per month times 12 months is \$96,000 per year. That would be your total goal for let's just say 2023. You set this number.

Jason: Fantastic.

Caroline: And then you're going to say, okay, what are my existing offers? Maybe I do client projects for like an average roughly project cost of \$2,000 per project. And then I run a quarterly workshop. I do that four times a year and I sell it for \$80. And then maybe I have one signature course that I sell for \$250. Right? Like these are my offers. Now the question is how many of these do you need to sell in order to make this, right? Like, I know it's simple, but really doing this at the top of the year is so crucial to see how you're going to actually get to your goals. So using this example, we're going to do a little offer math here. So we have a column for your yearly sales, the number of sales, the number that you're going to sell of each offer, your yearly revenue, and then your monthly revenue. How does that break down? So let's say I do, I try to aim for one client per month. So that's 12 across the whole year. That's going to net me \$24,000 in client revenue for the year, or again, \$2,000 a month. Cause it's one client a month for my quarterly workshop. Let's say I do it four times a year. It's a quarterly workshop. I charge \$80. Let's say I get 80 sales per quarter, roughly. That's going to get me \$6,400 per year or \$530 per month. And then finally for my signature course, let's say I aim to sell a hundred of those at 250 per, which brings me \$25,000 or \$2,080 per month. And if you add these up, that's going to get you \$55,000 per year or \$4,000 roughly per month. Right? And so when I compare that to my goal number, that's not going to get me there. So this feels realistic. This feels like what my business is right now, but that's not going to get me to my goals. So the question is how do we bridge the gap between where we are now and where I want to be? This is where you look at

your offers and you go, okay, you know what? That quarterly workshop, that's not really doing it for me. Right. It's a lot of work. I run it four times a year. I just, it's distracts my list. Okay. Let's say, what if I didn't do that this year? What if instead I just focused on getting one retainer client, right. For a full year contract, like, would it take a lot of selling like in terms of reaching out to people? Yeah, maybe, but is that, is that time better spent than doing the quarterly workshop? Maybe. So let's say if I get one retainer, it's \$12,000 for the entire year or a thousand dollars per month. Now for my course, let's say, okay, a hundred, maybe that's not going to get me there. What if I tried to get 250 sales, right? What would that be? That would be \$62,000. That would be 5,000. And that would get me to my goals, but maybe that feels like just so not with my list. It's not, I'm not going to be able to get there this year. Okay. Well, what's another way that I can get to that number. Maybe instead of doing a \$250 course, I figure out a way to do, to charge \$850. I don't just mean raising the price. I mean, like...

Jason: With whatever you're doing... repackaging.

Caroline: Repackage stuff, combine it with a website template. I'm going to do something to make that value there. And if I sold 80 of those \$68,000, \$5,600 a month, that gets me to my goals. And so the question is just offer math is all about just like literally doing this over and over until you get some type of outline that you feel like is realistic. Maybe it's going to take a little bit more marketing effort, but you feel like this, I could do. And it's so empowering to see on paper. Wow. If I sold this, I would make my enough number.

Jason: And it takes the guesswork out of how many things do I need to sell to hit my goals? And like we said, you may be at your number for a couple of years and it takes you longer than for some people to get to your enough number. And that's okay. This is all about your journey and doing that. So if you want to dive deeper on offer math, we have Unsolved Businesses sessions

and their workbooks all show examples of off-ramp with real WAIMers' businesses. So there are three of those. If you wanted to check them out, Unsolved Businesses two, three, and four. Also I'll go through that. So there's your deep dive. We snorkeled, here's your deep dive. Okay.

Caroline: And then finally, how are you going to hit those sales goals? Right? So you're going to ask yourself, is it an evergreen sales strategy or an open and close launch strategy? Plot your sales pushes and launches loosely on your calendar for the year. Now that you know, kind of like, like we're not doing the quarterly thing. I'm going to try to do a retainer client. Okay. I'm going to do a big like referral push in February. You know, like this is really now that you have the offer math, what you can do is have a loose marketing calendar. So create a spreadsheet where you can plot out your sales projections and sneak peek. We have this in your workbook where you can start to plot that out. And we'll also share with you kind of a more advanced way that we're doing this later on in the execution section. So we are, we have made it to the explainer recap.

Jason: We're close on time.

Caroline: We are 10 minutes behind, but that is not bad.

Jason: It's okay. It's okay. It's okay. It's our first month doing this.

Caroline: And so as a reminder, at the end of this section, now, what, and once you do the exercises, you're going to know who you're talking to. You're going to know why they're going to care about your business. You're going to know what transformation and benefit you're offering them. You're going to know what your, what offer you're selling now and what offers you might want to sell in the future to get to your enough number. You're going to know how much money

you're aiming for each month, both to break even right now and to live a beautiful life of your dreams where you're a cat. And then you're going to know how much you need to sell in order to meet those goals. And you're going to know what sales strategy you're going to use in order to meet those goals. Like that's what you're going to decide. And this is a lot of stuff. If you did all of this, which we just went over, like, please tell me that you would be in a better place with your business and more clear and confident than where you are now.

Jason: Absolutely.

Caroline: Yay.

Jason: Welcome to part two, mindset keys. Here are some guiding phrases to help you on your journey to putting this into action. Part two is going to be very quick. The idea is that we're just giving you some things to do.

Caroline: Yeah, I know. Feel free to screenshot if one of these resonates.

Jason: Oh, wow.

Caroline: Just things to keep in mind.

Jason: Also the budget. We spent all of the budget on the coaching session right here.

Caroline: There is a transition budget.

Jason: Just get ready for that. Yeah.

Caroline: So your first mindset key is to remember that specificity is magnetizing. So the more specific that you can get and who your business is serving, the stronger your magnet will be to attract those people. I'm not saying you always need a super strong magnet. This is the general versus niche conversation, but like for us, we want to make our magnet more magnetizing this year. So we're going to be more specific in who we're talking to.

Jason: Yeah. Here it comes.

Caroline: Whoa.

Jason: I'm not even gonna tell you how much we spent on that. I'm not even gonna tell you.

Caroline: It's a new animation that I found and I.

Jason: It's free. It's in Canva. It's just silly. It's a silly bit that I do.

Caroline: Key number two, clarity for you is not the same as clarity for your customer. So go that extra step to turn your clear foundation into communication for your potential customer. Repeat these key components on your website, on your social posts, on your sales page, on your emails to the point where you probably feel like you've said it a million times so that your audience understands every crucial piece of your brand story. This to me is where we kind of fell short is like, we took a couple of little bits and we kind of ran with those and we put those, but we didn't always update it. Like every time our clarity was updated, we didn't always update everything else. So I think that's what we can do a better job of.

Jason: All right. Key number three, a wrong step forward is better than standing still. Come up with a strong direction to head in... coming up with a strong direction to head in doesn't mean you can't change course down the road. We believe in choosing boldly and this moment will give you momentum. It will give you a tailwind propelling you toward action. Action. Any action is going to help you get farther than moving in circles, wondering which direction is the right one. This would also be done is better than perfect is very much in this line.

Caroline: I'm talking to my perfectionists out there. I'm talking to my overthinkers out there. I'm talking to my optimizers out there. I know you want, you don't want to make the wrong decision, but the wrong decision is the one where you make no decision.

Jason: I'm a completionist. Yes. Way to bring it there, Samantha. Love it.

Caroline: Right.

Jason: Present.

Caroline: Present.

Jason: Key number four. This is Carol gets credit for this one. Growing your numbers starts with knowing.

Caroline: I don't think I came up with that. There can't be, I came up with that, but anyway, I love a rhyme.

Jason: If you really want to bring your financial goals into reality, it begins with confronting reality now. Make it a point to know your expenses, your debt, your sales numbers, even your time spent, you can't solve for something you aren't first willing to see. This takes us back to 2013 Jason and Caroline who did not log in to check their bank accounts every six months, because we were afraid of the things we would find.

Caroline: I didn't like how it felt.

Jason: And it was, this was what kept us in debt. This is what kept us from moving forward is that we never confronted the reality of these numbers. And I will speak for myself. We would make a budget and one of us would not stick to it. And I don't know who that was. I don't know who eats the cookies all the time. Who's doing that?

Caroline: And I also want to say numbers also goes not just for money, but like, this is checking in on your traffic or every once in a while, checking in on your email signups every once in a while. Like if you don't see it, it's hard to know how you can improve it. So growing your numbers starts with knowing your numbers. Boom. One more budget transition. And our final mindset key comes from our win co-brandments. If you missed that newsletter series, those are the stickers. And this one is just one we come back to all the time, which is just embrace enough for you, right? So set your financial goals based on what you want for your life. Not some arbitrary number that you think will bring happiness. You will be more motivated when you know that that that number means something tangible in your daily life. So I highly recommend if you don't know what that goal number is that you're aiming for dig into those scuba dive deeper resources for your enough number and really connect the number that you're aiming for to why you're deeper why.

Jason: Yeah. Part three steps. So how can you use this information to improve your business? We'll give you exact action steps to make it happen here. So the action steps are going to help you know what to do to need to apply this to your business. I thought we already said that. They come in two different formats. So you have build and you have optimize. Use the build checklist if you're still building on our spotlight session topic. Use optimized checklist if you have already created the foundation of our spotlight session topic, but now you know you're ready to improve it. So we would be in the optimize.

Caroline: This will come handy much more in future sessions where like, if it's an email list building section, you're going to have an action list for like, I don't have an email list started, right? Like that's going to be a different action list than someone who has been, you know, talking to their list for three years. And now they need different tips for optimizing. So that is just to make sure that everything is applicable to everyone where they are.

Jason: Yeah. And so this month, the list is really the same. It's built and optimize at the same time. So you're going to define the four Q's or the seven key pieces of your brand story. Make sure you pick out that mushroom. You're going to use the checklist to make a list of where to update your communications with this new clarity. You're going to define your MMM number and your enough number for those of you who've been hiding from your numbers, like we used to, it's time to take those numbers into your own little hands and understand how you can change them. Also, I say little hands, my hands are gigantic. So I get to say everybody has little hands compared to...

Caroline: That's our hand difference.

Jason: Yeah. Know your offer math, how many sales you need to hit your goals. Loosely plan the dates of your sales pushes this year. Those are your steps. So the deep dive recap here, if you want to turn this snorkel into a deep dive scuba party, here are the resources that we mentioned throughout the entire explainer section. So we have the 4 Q's, foundation and brand story, you can find this the Better Branding Course. The 4 Q's Welcome Coaching Session, which is the very first session we ever recorded, which is a short one, or in our Unsolved Businesses. Our MMM number and enough financial goals. As a reminder, Reflect and Project 2.0. Thank you to those of you who are here live who said that you love the Reflect and Project. Like to hear that. Budgeting for Debt Payoff, really good session, because that's exactly our plan that we use to pay down our over a hundred thousand dollars in debt. And it didn't happen in one year. It didn't happen overnight, happened over multiple years. And then our enough article, which also many of you said you continue to send to people, which we really appreciate.

Caroline: Yes. All of these are actually at the bottom of the Notion workbook with handy dandy links. So you can just hop right over.

Jason: The deep dives when we're doing these spotlight sessions will always be referenced in the workbooks so that you can find them on the coaching page. We will also list them out on the replay page so you can find them as well. But if you're here live, you just get to like, know that they exist. Which is fun.

Caroline: Also, one of our big goals just for WAIM in general this year was to do a better job of communicating all the things that you have access to inside of WAIM. So this is part of that.

Jason: Is there a direct place that you would recommend LC to go to figure out...? Actually, LC, will you drop that as a Q and A question? Use the Q and A box. We'll come back to it.

Caroline: All right.

Jason: We're gonna stay on time here. Okay, let's get into part four.

Caroline: All right.

Jason: Carol's gonna take a mirror because this is where she lives.

Caroline: Now before we get into the notion execution of all this foundation, knowing what to do is only half the battle and we did that already, but having a reliable system to make it happen is the other half. And again, we're trying to lean everything more towards action this year as well, and really dive deeper into like, how do you kind of implement these things into your business? But the most important thing I want you to take away from this is that your system does not have to be Notion. Okay, so your tool of choice is totally up to you and completely dependent on however your brain works. It could be anything. Notion has transformed how we organize our business. And it was a huge, huge turning point for our ability to be able to create more and stay on top of the things that we wanted to do. And that's why we want to share our processes as a means of providing the most value. We think that going deep on a specific tool that we have experience with is overall going to be more valuable than just trying to be very vague and cover all tools. But you can still totally apply the concepts of what we're going to share, whether you're using Google Docs or physical planner or post-its like whatever your system of choice is. The tool itself matters so much less than the fact that you have a system that you use. Okay, so anytime I say Notion, I want you to replace it with the tool that you have and just go, whatever Caroline's recommending I do in Notion, how can I do it with the tools that I like to use for my business? So going over the business foundation, we highly recommend saving all of those

brand story bits in one place. So consider keeping your answers to those 4 Q's in one place, preferably somewhere that you'll be able to check back in on it as regularly as you complete project. So inside of the Notion Starter Pack, we actually have this page, My Biz Dashboard, and it has the 4 Q's. It's a version of it that doesn't have all seven bits, but something easy that you could do is just go to the spotlight sessions workbook and turn all those seven answers that you fill out into either. You could just drag them right into your biz dashboard or wherever you kind of keep like all of your business stuff at a glance. Highly recommend creating some type of overview of your business page. So whether you do that in your planner, whether you do that on a poster board in your home office, put it all in one place where you can come back to it regularly. So that's important for like implementing all of this. Now, when it comes to your financial goals, your MMM number, your enough number, we use a simple database to break down our monthly goal number into expenses, living expenses, like all the categories. And you're going to do that differently, but we do a little database so that we can actually see every time that we update the, or adjust the number. We can always see like, Oh, what did we set it before and why? And so we'll make notes and we'll say like, okay, our WAIM affiliate cost is going to go up, which means our tax is going to go up because we're making more money now. Like all those different things or like, Oh, we're saving for a house now, which we'll talk about and field notes like our financial goals are going to change based on our life goals and being able to update the number I think is really cool. And I use Notion databases for that. Again, a version of this exists in your Spotlight workbook.

Jason: Yeah. And I also love that we put it next to your MMM number and your enough number right next to each other. So you could clearly be able to say like, okay, I'm at my MMM number right now, but I also see where I want to get. And like the bridge to get there is not so far. Now that I'm actually seeing it, it doesn't feel so difficult to achieve.

Caroline: And by the way, you could put that database of your enough number into your Biz Dashboard and you can use synced blocks in Notion to put, include it in your financial dashboard. I use sync blocked all the time now for like my weekly planning. So if you create a block, that's like my goals for the year with my business, put it in your weekly planning, wherever you do weekly or monthly planning. And it always gets fed back to you no matter where you update it. So you're always reminded on what you're aiming for.

Jason: Love it.

Caroline: When it comes to projections. Okay. For a second, this is for like Notion nerds who want to go deeper. This is like a little bit more advanced. If you don't use Notion or if you're just kind of like getting involved.

Jason: Should I leave?

Caroline: You should maybe leave.

Jason: I should leave because I'm like all of you who are saying like, Notion, I'm not a big, like, I also like, I just use it because Caroline has set it up for us. But like if it were up to me, I would just write everything on paper and use it.

Caroline: Sometimes we like to include things that are like, like really how I use Notion in case for some of you that haven't been using it for years and really want to know. So this is a new thing we added to our Notion. This oops, go back. Well, it's okay. That's right. We added a WAIM projections database. Okay. So this is for us to project out our revenue for the coming year. And so our revenue projections have four pieces that we need to account for. Payments

from past sales of WAIM Unlimited, right? Because we have payment plans. So we need to go like, okay, someone who joined in the Fall launch, we need to account for their payments for the next 20 months coming in. Revenue from that's new revenue from our Fall and Spring launches. We have high goals for the sales goals, and we have low goals for those launches. Revenue from many launch experiments. We'll talk about that more. Okay. And then finally revenue from our email funnel that still does run in the background.

Jason: Yeah. So it's a little bit difficult for us because there's a lot of different moving parts, but yours might be really easy where it's just like upcoming sales of my course and you just have like high and low, high and low goals.

Caroline: Yep. So thanks to all of you who have been using the Notion Starter Pack. That's very great. Okay. So how do we actually do this? We create the WAIM projections database, and then we create a relation to our WAIM buyers database. And that is where we track every new buyer that comes into WAIM. Jason had this great idea the other day of things that people would probably be surprised that we do in our business. And one of them is that Jason manually logs every new buyer in this database.

Jason: Not only every new buyer.

Caroline: And every payment.

Jason: Every payment that comes through.

Caroline: Yeah. But what we like about logging things manually is that it forces you to be aware of your numbers.

Jason: It's also a great backup too, because like our membership plugin for some time, some reasons like doesn't talk to Stripe or PayPal because PayPal is just a dumpster fire. So this is great to have this as a backup.

Caroline: Yep. So let's say this was a new buyer. We'll say whatever the price of their payment plan is. So you can see there's one that's 400 as well, depending on the payment plan. And then Jason will also type in how many payments. So if you're on the 20 payment plan versus the five payment plan, and then we have a formula that basically calculates the date of the final payment for WAIM. And what that enables us to do is this particular new WAIMer, we can see they're on the 20 payment plan, their final. So their first payment will be December, 2022, which is when they bought their last payment will be July, 2024. And so what that does is in this little relation property, I'm basically telling Notion, account for this hundred dollar payment for the next 20 months, these months, and it relates over to our months in our projections database. So for example, this person, that you can see there, it's 20 linked pages all the way from December 2022 all the way through July 2024, 20 different months. And that basically allows me to roll up into our projections database and say, okay, add up everyone's hundred dollar payments that are coming through in January 2022. And that number is going to be \$29,000 in revenue of just past payments. Right. And so...

Jason: But I also think like, just very quickly, if you have a keen eye and you look at this, like this is the good and bad thing about our business model and doing a lifetime pricing model. If we were to bring in no new customers to WAIM, you would see that by the end of this year, our revenue would drop considerably almost by 75%. So for our business to continue to be healthy and to have revenue, we have to continue to get new members and we have to use, and we're okay with that. That's a decision that we're okay to make because we love offering the lifetime

pricing model. So, but it's just really helpful when you identify it like this, because you can be in a really good month, but you're not thinking about the long-term of how that actually is going to pan out. So for those of you who use payment plans, this is also something for you that would be helpful. It'd be a payment plans of 6 to 12 months. That's great in theory, but once you get to that 12 months, then you have to bring in more customers because your revenue is going to drop.

Caroline: Exactly. So you could do this with your client cashflow. You could create a projections database with months of the year and then clients and have a relation property between those two. And that way you'd be able to log every payment from your client. So you can, again, just manage cashflow, but you won't have to do this automatically in this way. Sorry. Also, I wanted to point out that we have been in this database. Now that we know what money is coming in, we can play around with new revenue added. So play around with our offer math, with our launches. And so that's where we do this. We use this table, same table, WAIM projections table. We have columns for each of the sales for our launches. So for example, this is our March 2023, our low goal is 120 new WAIMers. 90 of the 100 payment plan, 30 of the 400 payment plan. And so you can see, we're just like logging that across the 20 months and across the five month payment plans.

Jason: I just wanted to say, like, I really hope this is interesting for those of you who like, we went through the offer math and you're like, Oh, okay. Like these are nice, like fictitious numbers. Like these are our real numbers. Like we're sharing, we're not sharing like hypotheticals with you. Like this is, we did this work a couple of weeks ago, and now we're sharing like the reality of like what we went through to show you our own business.

Caroline: And all these exercises we tell you about, we use. And so again, you're going to log that. For us, we log that across 20 months and we log the other payment plan across five months. And we play around with those numbers. We have separate columns for our low goals and our high goals so that we can see what does it do to our revenue added if we go from 120 new WAIMers to 150, what does that do? And so being able to play around with those numbers is key. And then how does that factor into our overall enough number? And does that get us there? So no need to over-complicate this though, if you don't want to do all of that math and do all of that, like automatic things, there's just a simple version in your workbook. That's just productions by offer and nothing automatic is happening. You're just going to enter the revenue number per month so that you can see the totals added up.

Jason: All right, folks, let's talk about the Wall of Fame. Oh, cute.

Caroline: One of the badges got out of its group.

Jason: Huh? Who did this? Who did that?

Caroline: Go away.

Jason: Who did that?

Caroline: Go.

Jason: For those of you who don't know what the Wall of Fame is, every week in Slack, after the coaching session, the next Wednesday, I post a question or a task for you to contribute to, and

you get added to this slide in our coaching sessions. That's it. It's nothing crazy, but it is a nice little accountability thing.

Caroline: It's really about taking action on the coaching topic.

Jason: Yeah. And we've been doing it for 34 sessions. And the way that I know this is because Darby has done it for every single session, which is incredible commitment. Darby, congrats to you. Congrats to Katherine, to Jessica, and Shannon, the mother-daughter combo. To Rachilli. Hold on. To Kriss, to Monika, to Rebecca, Anka, and Natalie. Congratulations, Natalie. That was your second time being on the Wall of Fame ribbon that we left out there for everyone to note.

Caroline: We really did consider. We said, are we going to keep doing the Wall of Fame this year, or are we going to not? And I was like, I can't decide if I think that Darby would be relieved or really mad for all those months, and then it's gone. So we're just going to keep doing it.

Jason: Yeah. If you've never done it, it's in the coaching sessions channel in Slack, in WAIM Slack. And again, you can just look through that channel and you'll see the posts that I put up for you to be able to contribute. It's not a real difficult task every month. And even if you're not working on that month's coaching session, there's always an option now for you to post whatever it is that you are working on. So it's actually like if you're doing anything from WAIM any month, you can get a pretty good chance to see your face here, which is very illustrious.

Caroline: And to answer the question yeah, no, it's just for fun. The only thing you get is you get to be on the wall.

Jason: It's for absolutely nothing, like less than nothing. Honestly.

Caroline: Speaking of fun.

Jason: Okay.

Caroline: Okay.

Jason: For those of you who you were looking at something earlier and you were wondering, what is that thing? We think some of you are going to think this thing is awesome.

Caroline: We have a new thing.

Jason: Yeah.

Caroline: And some of you are going to think that it's awesome.

Jason: That's what I just said. Some of you are going to think that it's not awesome.

Caroline: That's okay.

Jason: Just want you to know.

Caroline: That's fine.

Jason: All of you will agree. All of you will agree.

Caroline: You'd have to.

Jason: This is un-boring.

Caroline: You would have to.

Jason: And I just want to bring it into focus here to introduce this new thing. For those of you who might be in another tab or looking at Instagram on your phone or TikTok or whatever, just come back for a moment, just for, like, two moments, so that we can share this new thing that we've created for you. Because it's very fun and I'm very excited for it because I love un-boring things. We are introducing... WAIM of Stones..

Caroline: It's WAIM of Stones.

Jason: It needs a riff.

Caroline: It is...

Jason: Like, it needs a riff.

Caroline: It's not Game Of Thrones. It's WAIM of Stones.

Jason: Some of you were saying badges earlier. Some of you were saying things. It's WAIM of Stones.. Now, the amount of times we've said Game Of Stones or Game Of Thrones or WAIM Of Thrones.

Caroline: But it's too good to pass up.

Jason: We are not throwing anything at you.

Caroline: No.

Jason: We are not actually making any stones.

Caroline: No.

Jason: But we have a new un-boring accountability game.

Caroline: It's separate from Wall of Fame.

Jason: It's separate from Wall of Fame.

Caroline: Wall of Fame is going to remain accountability just for the coaching sessions. It's like you just, you do the thing in the coaching session so that we know you took some action that you're going to get on the wall. That's separate. WAIM of Stones. is an accountability game...

Jason: I'm going to go over it right here.

Caroline: It's completely dependent on whatever you are trying to accomplish this month in your business. It doesn't have to be related to coaching.

Jason: Yes. So WAIM of Stones is an un-boring accountability game where every month in a new Slack channel that we have yet to tell you about. So don't worry that you haven't seen it because it hasn't been out yet. We're going to ask who's joining the game that month. So the beginning of every month, we're going to go "Who's in for the game?" So you just have to announce that you're in for the game. You reply with your one monthly goal that you want to be accountable to. Your goal is completely unique to you. It could be, I want to learn how to ride a horse. It could be, I want to learn from Penny how to start my own horse riding business because Penny is doing that. It could be, you want to be a cat by the end of the month. Whatever it is your goal might be, you could do it. Email marketing stuff you want to work on, articles you want to write, it doesn't matter. It's your goal. So every month you're going to commit to that. Then every week in this Slack channel, I am going to post a message that you are going to reply to. And you're going to say, here are the three things that I'm working on.

Caroline: We have a format for you. So don't worry over this.

Jason: Don't worry. Just, Hey, stop worrying. It's okay. It's fine. It's a new thing.

Caroline: It's okay.

Jason: Okay. Geez. And you're going to move one step closer. What does one step closer mean? We'll show you in a second.

Caroline: What does one step closer mean?

Jason: If you check in for all four weeks or five weeks of the month, because some weeks are going to, some months are going to have five. You're going to collect a fictitious, not real. You're not going to get a real one. It's a fake one.

Caroline: What are you going to collect?

Jason: WAIMfinity Stone.

Caroline: It's a WAIMfinity Stone. Don't sue us, Marvel.

Jason: Please don't sue us, Marvel. It's a WAIMfinity stone.

Caroline: It's a WAIMfinity stone. Wow. Do you want a preview of the first game board?

Jason: Would you like...?

Caroline: You bet you do.

Jason: Would you like the first world that you're going to encounter in the WAIM Of Stone?

Caroline: Because it's the Canyon Of Courage.

Jason: This is the Canyon Of Courage. This is going to be February's mission here. You're going to start off at spot number one, right? That's where you're going to be.

Caroline: Just by saying that you're joining the month, by the way, you get to spot number one.

Jason: Then you're going to move on to spot number two.

Caroline: Wow.

Jason: Then you move on to spot number three. If you make it to spot number four... I know, I know. I got it. I know how this goes, Carol. I studied these slides.

Caroline: We should have practiced.

Jason: No, we shouldn't have. I had these nailed. All right. This is Raraline, a person who just joined WAIM. Her name is Raraline. It's very similar to Caroline, but it's Raraline. February 6th or 7th, I can't remember the day, I think it's seventh or sixth. I don't know. Sixth. I posted in the new Slack channel, post your goal. Raraline said, "My goal for this month is I'm going to write my 4 Q's. I'm going to change up my homepage on my website. That is my goal." Raraline, great job. You are at step one.

Caroline: To be clear, it doesn't have to pertain to the coaching session.

Jason: Great job, Raraline. You're at step one in WAIM of Stones. in the Canyon Of Courage. Week 2. I post, "What are the three things you're working on this week to work towards your goal?" Raraline replies to that thread and said, "Here are the three things: I'm going to fill out my workbook, I'm going to survey my audience, and I'm also going to have some tea because this week I just need to cool it. I'm feeling my anxiety is a little bit flaring up." Raraline deals with anxiety. It's part of her journey. Great. The next week, which is going to be February 20th.

Caroline: Yep.

Jason: It's a similar message. What are the three things you're working on? How did last week go? Raraline posts again.

Caroline: I made up some brand messaging exhibits. I outlined my homepage.

Jason: Now here's the thing. If for some reason, Raraline does not reply in one of those three weeks, she's not going to move forward.

Caroline: She stays at spot number two.

Jason: And that's critical because here's what happens, when Raraline posts in the fourth week, in the final message of how did you do getting to your goal?

Caroline: And is it okay if I didn't get to my goal?

Jason: 100%. All you have to do is check-in. It's accountability. The game is accountability. You're being accountable to the stones.

Caroline: Okay. What happens if I check in on the fourth week?

Jason: I'm so glad that you asked this, Raraline, Caroline, here's what happens. You get a WAIMfinity Stone.

Caroline: Oh my God.

Jason: You get a WAIMfinity Stone. And this one happens to be the Apprentice Stone. The apprentice is giving you this stone. Becky, stop. Yes. 100% you will get this.

Caroline: Literally hot. Like I'm hot because I spent a lot of time on this.

Jason: So sad Rachilli is not here. Don't worry. She'll get the replay. She will love it.

Caroline: She'll get it.

Jason: Now you may be wondering, I think I saw this question come through multiple times in the past moment. Are there other stones besides just this one? There are eight WAIMfinity Stones to collect this year.

Caroline: You can collect eight WAIMfinity Stones this year.

Jason: These are fictitious. These don't even exist. There's no, you're not even gonna have them. It's a-

Caroline: I don't know.

Jason: We bought these stones on Creative Market. Like you could go get them yourself, but you're not going to have the titles to them, which is the Apprentice Stone. We'll go back and forth.

Caroline: I want to be clear. You'll notice there's only eight stones. And that's because we are going to take breaks and we're only going to run the game for eight months out of the year. Don't worry. You'll know which months they are.

Jason: We'll give you plenty of heads up.

Caroline: The first stone is in February. That's the Apprentice Stone. Let's take them through the rest of the stones.

Jason: We're going to go back and forth. The first stone is the apprentice stone. That's for February.

Caroline: The second stone is the Squire Stone.

Jason: Why is this woman wearing a bikini in battle? I don't know. The third stone is the Warrior Stone. I want you to notice his facial hair. He's looking pretty great.

Caroline: The fourth stone is the Archer Stone.

Jason: He looks a little bit more ready for battle, if I'm just being honest. The fifth stone is the Ranger Stone.

Caroline: She uses like futuristic technology that she's ranging. The sixth stone is the Knight Stone.

Jason: The seventh stone is the Champion Stone. And the final stone...

Caroline: ...the Wizard Stone.

Jason: These are the eight stones that you will get to collect throughout the year. Yes. Jen, we're going to think through some different things to do with these stones.

Caroline: Yeah.

Jason: We're going to think through...

Caroline: We're going to think through the avatars photos.

Jason: Yeah. When we do the check-ins every week, there's going to be a little board that shows like who has what stones and like there'll be something with that. So we can keep track. So like you don't have to keep track at home of what stones you have.

Caroline: We will keep track.

Jason: We already have a Notion database set up for this.

Caroline: There will be places for you.

Jason: I also understand that some of you are going to start this in March and you may miss out on the Apprentice Stone. Guess what? That's your fault. You're never going to be able to get it.

Caroline: That's okay.

Jason: You're not going to get it. I just.

Caroline: Okay. That's why I will say, that's why it was very important to us. We did think through this game and originally it was like a level going up.

Jason: Yes. But we were like we're not about levels here in WAIM.

Caroline: So it's just about like, no stones are better than the other ones. It's just like the amount of stones that you get. And there will always be more chances to get stones. Okay. So.

Jason: Let's give you a little bit of a heads up on what's next with WAIM of Stones. What's next here, January 27th, that's this Friday, two days after this coaching session happened, you are going to get the coaching replay email, which will talk about WAIM of Stones in the Slack channel you can join. Also posted in Slack, there will be a message going out on Friday as well. Same thing, so that you can get it in Slack or email what you need to do, what channel you need to join. On February 6th, that's a Monday. It's the first Monday in February. You're gonna look out for my message in the new Slack channel, and you're going to comment with your month-long goal to get on the board. So that's gonna get you to spot one.

Caroline: Yeah. So that's your really key date. Like you wanna join.

Jason: That's your key date. If you wanna be on it, you cannot join February 13th. I'm so sorry. You can't. Actually you can, that's totally fine.

Caroline: We'll just figure it out.

Jason: Because what's gonna happen is on February 13th, we're gonna post a game board, and it's gonna show all of you who are at spot one who commented on the previous week.

Caroline: Yeah.

Jason: Oh no, that's not true. We didn't add it in here. It's the Wednesday after every Monday we post the board.

Caroline: Yeah, we post the board on the Wednesdays.

Jason: Sorry. Yes, so it's a 24-hour window. Don't worry, the steps will be outlined clearly. This was just to give you an overview.

Caroline: Becky, yes, because of time zones and all these things, like you're definitely gonna have a 24-hour window, and there's some overlap, so don't worry. But we post the board on Wednesday.

Jason: Yes. So every Monday, again, you're gonna have a comment with your check-in, and then on the last Monday, you're going to check in, so that's February 27th, you're gonna check-in with how you did, and it could be good or bad. You could say like, I totally flopped this month on my goal. I did not become a cat. That's okay. It does not matter. You just showed up, you tried it. Being accountable does not mean you're always getting everything done.

Caroline: Yep.

Jason: It just means you're trying.

Caroline: That's right.

Jason: So that is the goal with this. If you make it to space four, you're gonna get WAIMfinity Stone. It's pretty exciting.

Caroline: It's very exciting.

Jason: You just bought them on Creative Market. Don't go look for them. Do not buy them yourselves, because we made them. They're not on Creative Market, okay? I just want everyone to know that.

Caroline: Yeah, do not start selling black market WAIM of Stones to each other, please.

Jason: Don't do it. All right, so that's WAIM of Stones. We are super excited. We'll see how the first month goes. Again, you know-

Caroline: We've thought about this quite a bit, but we recognize that there might be some...

Jason: Holes in the game.

Caroline: In the game.

Jason: There may be a hole that you fall through, and-

Caroline: But we're just, we're trying to make it fun. We want to make accountability fun.

Jason: Listen, yeah. The goal is that like accountability systems, we know about this in mastermind groups, or in courses, or in Facebook groups, or in Slack channels. It's just like a thing that you do, and it's kind of boring. And like, you just stop doing it after two months, because you're like, why do I care? But this, we hope it's like, it's really, it's stupid. It's really stupid to give you fictitious stones, and to make this logo, which we're gonna show you how we did using AI. Like, it's really dumb.

Caroline: It's silly.

Jason: But also, it's fun. And you're gonna get to see all the different worlds. So we had like a canyon world. We have a snow world. Okay, so sorry. I'm so sorry.

Caroline: Leave a little bit to the imagination. Yeah, there's worlds.

Jason: Yeah. All right, so that's WAIM of Stones. We hope that you'll check it out again.

Announcement on the replay email, and then in Slack, and then also in our WAIM Weekly video. We will mention it next Monday, too.

Caroline: We really, we need, we're not gonna, it's fine.

Jason: It's not good.

Caroline: We're just 10 minutes to max on the field notes, but it was worth it.

Jason: We have three field notes for you.

Caroline: It was worth it to go through WAIM of Stones. Let's get into field notes, shall we? All right. So we have three field notes updates for you. Part one, we're gonna talk about our 2023 goals because we love sharing behind the scenes stuff. Part two, maybe a sneak peek. That's right, there's more. There's more sneaky peaky stuff.

Jason: Exciting.

Caroline: And number three, using AI. Yeah. You've heard about AI, chat, GPT, all kinds of things.

Jason: Yeah.

Caroline: What's happening there? All right. So let's start with our 2023 big business goals. So likewise, we're moving out of an enjoy and spend phase and into a grow and save phase. That's just where we're at. We, on the horizon, we would like to potentially buy a house probably in Portugal.

Jason: Been renting for like 10 years. It's probably about time.

Caroline: Children, maybe.

Jason: Okay.

Caroline: Those cost money.

Jason: Right, we've heard.

Caroline: And so this means moving from kind of maintenance mode with our business into growth mode. Of course, we're always keeping an eye on enough. And our version of that just means like knowing why we're growing, right? Like not just trying to grow just for growth's sake. And so that's what enough means to us. And so, but it does mean that we are gonna try to move things forward this year. And you're gonna get to see all of that behind the scenes. So this will mean focusing more on sales and marketing. Still trying to do that without social media. And so again, you're gonna get all the behind the scenes on that. And this will also mean focusing on investing in projects that will carry us through the next five years. So this means patching holes. Like we already discussed patching holes in our communications and in our brand story. Patching holes in our website, patching hole... Like I just mean metaphorically, like improving the infrastructure.

Jason: Yeah.

Caroline: So we want to grow our revenue and save. We wanna save pretty aggressively \$100,000 by the end of the year. And again, we're very transparent with our numbers. We do that in order to be empowering. We don't want you to compare your numbers to us. We don't want you to-

Jason: Also remember we're two people.

Caroline: Yep.

Jason: Like a lot of times you hear our goals, you see our revenue, you see it and it's like, well, that's all it's like. But also like you may have a goal that's half of what we have. And then if you had another person with you, it would be the same.

Caroline: Yeah. But we do think that there's power in transparency and in talking about money transparently. So we hope you get value from that. But how are we gonna do this? So the first piece of it is our launches. We already told you our goal for, we're gonna do Spring and Fall launches. We would like to bring in 120 new members as a low goal in Spring and 150 new members as a high goal in Fall. That's our goal. That's like the 150 or high goal is like an aggressive goal. That's what we want. Number two, we'd like to experiment with two, what we're calling mini launches, doing this two months after each of our live launches. And so this means pulling out like one product or one standalone thing. Like a good example would be the Notion Starter Pack. People have asked us constantly to sell that. And we have done the, we've PEWT-ed that project several times.

Jason: PEWT is our process for going through, should we do this thing?

Caroline: And estimating the time that it would take. And it was never like important. It was more important for us to focus on WAIM Unlimited, but we really, now that we have more time and more space, we want to experiment with these one-off launches and see what that does. And also when you have, this is like a perfect example of the offer math. When you have a more aggressive savings goal for your like enough number, where is that going to come from? And so these mini launches are also a way that we're going to try to work towards that. And then we're going to start prioritizing marketing for Teachery. And we have a pretty aggressive goal of growing our customers by at least double by the end of 2023.

Jason: Which we have 250 customers of Teachery right now. So it's not a huge number of people we need to find, which is great because that makes it very achievable.

Caroline: Yep. Erin, the best place is in the WAIM library, just search Notion Starter Pack.

Jason: Yeah.

Caroline: We're going to make a better URL for that. But unfortunately I even learned that there's not a great URL for that.

Jason: Yeah.

Caroline: But spoiler alert, things are going to be easier to find in the future. That's a sneak peek coming up. So how are we going to do all of this? Well, if our current email conversion were to stay the same or even decline slightly, how many subscribers would we need in order to reach our sales goal? So this is what Offer Math gets you, is you go, okay, now I know my sales goals. What's my marketing numbers to get to that? So like, if you're a math nerd, this is like digging in even further. And when we did our yearly planning, we had like, we made this little database and Notion of our 2023 lead gen goals. And so what we determined was, right now we convert about 2% of our email list. So 2% of people who get our emails for our launches convert to sales. And so if you do that math and let's say even you, it went down a little bit, like let's just say conservatively, if we converted 1% of our email list to sales, we would need 15,000 subscribers to get 150 sales.

Jason: That's not 15,000 new subscribers, that's 15,000 total. And we're currently at 11,500.

Caroline: Right. And so I really like this because it shows you then, okay, and also it allows you to go, what's realistic for me? So is it realistic for us to grow our email list from 11,000 to 15,000 by Spring and hit our high goal of 150 sales? No, like it's just not. And that's okay. But being able to see it in kind of numerical form allows us to see what is realistic. Like, so for us, for our yearly goal, our goal is to get to 15,000 email subscribers by the Fall launch.

Jason: Which you're gonna be able to track along in our field notes every single month moving forward how we're doing that.

Caroline: So highly recommend if you are someone who does find the numbers empowering, maybe doing some version of this slide for yourself and going, especially if you have like a repeatable launch that you've done before saying, okay, here's my sales goal. Here's my list goal. How many subscribers I wanna get if I convert up whatever percentage you convert up. And then we asked ourselves, where is our marketing bridge the weakest right now? So just as a recap, you all know, I love this like simplified marketing bridge. Awareness, interest, consideration, purchase. Like what point of that bridge are we breaking down?

Jason: We have a full coaching session on this by the way.

Caroline: Every single piece of this could be better. I think interest, especially like getting more people to our email newsletter of our traffic that's coming. But we know that awareness right now and traffic has been on the decline. And so invest is like our goal. And so we need to address that and make sure that we're attracting the right traffic. And this goes hand in hand with our business foundation that we just did of trying to speak to that person who's transitioning from, who wants to transition from clients to products. So that's gonna be a big goal for us, which means our first quarter project is gonna be what we're calling Narticles.

Jason: Narticles.

Caroline: Okay, so that's 10 to 15 new articles focused on targeting our ideal customer. That being client-based business owners who are looking to transition to digital products, namely online courses. We did a little bit of keyword research on online courses versus digital products. Right now, we're going to go with online courses to be a little bit more specific. Mobile first design is something that we are going to move to. Our articles are not that easy to consume on mobile devices. And that's like over 50% of traffic. So, I think the world is moving there. More scannable, more bite-sized. And then experimenting with some Pinterest amplification and YouTube amplification, which is going to be fun to follow along because those are two areas. And what we mean by amplification is like ways to use those channels to get more eyeballs on that traffic. So, you will be able to follow along with all of those fun things this year. And we don't just want to attract more new people. We also want to make WAIM a better experience for all of you. Okay? So, who wants us to spill the details?

Jason: You want to see the behind the scenes of some redesign that's happening right now? Are you curious? Are you interested? You're still just in a daze of stones and you're just like, I want those stones. I need those stones.

Caroline: So, my caveat. Yes, there is a new WAIM dashboard that is coming soon. My caveat before I show you this is that this is like just a glorified wireframe. It's not going to be as fun because there's no personality added to it yet. But Jason and I are really thinking through the functionality. We went through all of the survey results. We did a survey a while ago about how to make the dashboard better. And so, there's a bunch of new things that we're adding and we're trying to think through the usability of it. So, just like it's all very up in the air. Okay? And

Jason convinced me to show you this even though I've only been able to work like a couple hours on it.

Jason: Yeah. Also, we designed the first WAIM dashboard over five years ago now at this point. And it has lasted us, which is fantastic. But now it's time to move forward and we're super, I'm super excited to have something. But also, the other one served us for five years, which is great.

Caroline: And we want it to be more usable. So, this is the old dashboard. This is the current dashboard. We took a look and we were like, that is very, you don't know where your eye needs to look, right? It's very cluttered. The photos are distracting. We can see that now. There's a lot of information. It's just a lot. And it's not like a, it's not easy to sift through all of the things that we have inside of WAIM right? So, what we're hoping to do is to kind of streamline things. And a couple of things I want you to, I want you to notice are it's much, it's going to be a lot easier to see every resource at a glance. Okay? So, they're going to be hopefully in this little card format with tags so that you can search by tag and you can sort. So, this is actually going to be the coaching. So, the coaching hub is going to come inside of the dashboard so that you don't have to go to two different places. That was something, that was a solution that we had when we had the coaching program separate from WAIM Unlimited. Now that everyone's under WAIM Unlimited, it's all going to be in the same place. We're going to have better search. That's going to be up to us to tag things a lot better, but it's going to be a lot easier to find things for your specific needs. So, like, I'll show you in a second, but you're going to be able to search by category and see everything by category. And then, like I said, the coaching hub is going to be integrated. So, this is just, again, a quick like reference, but this would be the coaching section of the dashboard. And you can see all the tags at the top there. You would be able to say, okay, fix marketing bridge. And it would only show you the coaching sessions that are related to fixing

your marketing bridge. And so, you don't have to go sorting through all these things. Like we are going to think through the categories and everything for you. So, whatever you're trying to do in your business, WAIM is going to offer up the things that are going to help you get there. And then we're thinking through this execution of the next section being on the right-hand side. So, you always know exactly when the next sessions are, what they're on, what time, all that.

Jason: Yeah. And you had a really good idea, literally right before we started the coaching session, this right column that has the features.

Caroline: I don't know that yet. Just don't put it out there yet.

Jason: Okay. Answering someone's question that I saw. Yes, you will still be able to bookmark. Those are all now on hover. So, when you hover over the notes, the bookmark, whatever else is there.

Caroline: And then completed. So, the actions, all of your notes will be maintained. And so, whenever you hover over a card, you'll see the action. So, they don't clutter up the visual view, but the interaction is still there. You can save things to your dashboard. You can write notes on things. And now, it'll show you when you complete courses as well.

Jason: And as a reminder, this is without adding much personality to this design. This is just like high fidelity wireframe of like, where do we want things to go? How can we make them less chaotic? Maybe they'll stay this simple. We'll see. As far as a timeline, cannot give a timeline because the designs aren't finished yet. Like, we haven't even gotten to like half of the pages that are on the left sidebar. But once those are done, they have to be handed to a developer. The developer has to work with our system that we have now and like make it work better. And

our current developer is awesome and amazing, but he is very meticulous. So it's going to take him time. So I think we're not going to put a date out there, but I think the internal goal would be by the Spring enrollment time.

Caroline: That would be great.

Jason: That would be ideal, but it may not happen just depending on how complex the development is going to be.

Caroline: But the point is you are going to get an easy place to see all of the things inside of WAIM and be able to use them all, which makes us happy.

Jason: Yeah. And we hope you like, we know many of you didn't use the dashboard very much and it was probably just because it's very cluttered. It's hard to search. Like we've added more to it over five years and so it's become harder to use. And so having this refreshed version, we hope you'll want to come back to it and use it more and have it be something where you go, oh, I want to like make more money in my business. What are some WAIM resources that can do that? Boost revenue. I can click that and just like see what those resources are. Okay, great. Great job, Carol.

Caroline: So sorry, one feature that's not in this that you can't see, but if you see that little quick links button in the top right hand corner. This is an expandable menu that has quick links to the Roadmap.

Jason: Yeah.

Caroline: The Roadmap checklist. The probably all of the workbooks.

Jason: Yeah.

Caroline: Like everything that Teachery, like everything that you use the most often, that little quick links menu, you're going to be able to just go there. So I know, again, it's really hard to find things, but that'll be the Notion Starter Pack, the Page Layout Library. Like it'll all be there.

Jason: Great. All right. Let's talk about some robots stuff, me and how new tools can help you with your business. And just a few ways that we've been playing around with these and allowing us to like create more things, but not just using them to build those things.

Caroline: So I'm curious in the chat if anybody like just where is your mind at right now when it comes to when you hear AI? Have you heard people talking about ChatGPT? Are you like, what is this even about? Are you intimidated? Are you confused? Are you like, yeah, I've tried it and it's really cool. Or like, I'm excited about how AI can be used in my business or like I'm scared about the future. Like, I'm just curious where everyone is, because before we like probably before two weeks ago, I was just sort of like, what is everyone talking about?

Jason: A lot of people are concerned. A lot of people are like.

Caroline: Concerned, sure.

Jason: I'm skeptical about this. A lot of people are kind of playing around a little bit. Yeah, it is really interesting just, you know, how everyone kind of sees this differently.

Caroline: Yeah.

Jason: And I think it's like any of these new tools.

Caroline: Yeah.

Jason: They're just like it's like imagine having a toolbox and someone throws like three different more screwdrivers in your toolbox. Like, I don't have to use those.

Caroline: Yeah.

Jason: And I already have screwdrivers that work. So like, these aren't going to necessarily make my life that much better. But like, I could maybe play around with one and see if it does something interesting. And I think that's where we are.

Caroline: Monika, I think that describes it for me as curious and concerned. So it's like, I'm going to withhold like judgment on like how this is all going to, how are we going to do this responsibly? And I'm curious about ways that it can help, you know, improve what we're doing in our business. So I wanted to dip my toe in, as I always do, of just trying to figure these things out and kind of get my own from the inside vibe versus just like listening to everyone else's opinions. So if you're curious, here are two things that we experimented with. We played around with Notion AI because we were on the waitlist and we got access to it for writing inspiration and then mid journey for image and design inspiration. And I just thought that you would be interested in how we've used this. So again, we found the key is not in relying on these tools to do the work for you at all, but to use them as a booster to get started or to break through creative blocks or to help you think outside the box when you get stuck in whatever your brain is

doing. So how can we, how can you use these tools as of now, Notion AI is only available to those on the waitlist, I think.

Jason: But anyone could sign up for it.

Caroline: But you can sign up for the waitlist at [Notion.so/AI](https://notion.so/AI). And then as for mid journey, this is one that was really intimidating to me because it's free if you join their Discord and I personally don't use Discord and it just like feels like a place that I shouldn't be in.

Jason: You can watch lots of YouTube tutorials on people signing up for it. Like it's not that difficult.

Caroline: But I did it and I watched a tutorial and I was like, oh, you know, I'm just going to hop in here and see what's up. So I did that. And so you can join their Discord and join the beta that way. So first I'll share with you three ways that Notion AI can help you. And so number one is brainstorming points for a foundation article. Number two is brainstorming slides for a live workshop or a presentation. And number three is brainstorming creative ideas and names for a fun project. These are just examples. It can do a million more things than that, but I just wanted to show you these are three concrete examples. So let's go into Notion AI helping you write a blog post. I went to a blank page and if you just type help me write, you can kind of give it a prompt. So I said a blog post with five tips for building marketing buzz with your email list before you launch an online course for maximum sales. And this is what it came up with. And so you'll see it's like, okay, introduce the course in advance, offer an early bird... like it's not bad. And I actually thought even you can edit your prompt too, to make it give better things. And so this actually spat out some different ideas about topics for newsletters leading up to a launch. And what's funny is I originally intended this to be a blog post that I would write, but actually, even if

you weren't writing a blog post, you could actually use Notion.ai just to give you some business tips, you know, just some advice about like, okay, how should I structure my pre-marketing campaign?

Jason: And even if it's just a way to like avoid blank page syndrome, like that's what we found we were using it for when we were having brainstorming sessions, we're like, okay, like normally we just have to do it ourselves, but this kind of gave us a prompt to be like, okay, we're not using any of this, but this led us in a whole different direction that we were really excited about.

Caroline: The point is like, I think it's, this is where I think it's really important is not to just copy and paste this into a blog post, but to really kind of imagine that you asked a friend to give you ideas for a topic of a podcast and it gave you this and then go, oh, okay. Like I'll take some of that. I'll take like two of those kind of makes sense to me, but, oh, that actually made me think of this other point. Right? Like that's how we kind of think about it. I just tried to move forward. So our second example is Notion AI helps you structure a curriculum. And so I just recently learned too, that you can ask it to do an outline of slides and also it matters how specific you are and what the format that you want it to be. So if you say an outline with 10 slides, it'll probably do make maybe bullet points, but if you want bullet points. Oh, no. Yeah. So it says by slide, but if you wanted bullet points, you would maybe rewrite it and say a bulleted list of, or you can say, give me a list of 10 bullet points with three supporting points each on. So you have to be really like specific about your prompts, but I find it really fun to, so I said, and three key bullet points for each slide. That's what I'm editing my prompt there. And so listen, not all of these apply, but if I was going to go, what's a business foundation presentation? Maybe I don't need to use like providing customer service, but developing the website, building a brand, like it would just get the ideas going. Right.

Jason: I like to think about it as like this robot friend where you're like, Hey, robot friend, I'm stuck on something that I want to create content about. Like give me some ideas and your robot friend is like, sure I can do that. And just like spits out a bunch of ideas. Some are crap, but some of them are like, oh, that's a good one. I can now use that and move forward.

Caroline: And then the last one that actually really surprised me is you can actually use it to help you brainstorm even very silly things. So when we were doing WAIM of Stones, we were trying to come up with the names for the worlds. So this is like a little bit of a spoiler. It's not going to be all the names, but I said, 10 ideas for a creative name of a game level about online business that begins with quote, ravine of, with alliteration, if possible. That's what I told it. So the more specific your prompt is like the better your results are going to be. Cause I really wanted it to be like, Canyon of Courage, ravine of blank. And so it gave me all of this. And so it's one of these or near one of these. And so not all of these are good ideas, but it definitely kind of got me past that creative block of being like, I don't have any R words in my brain. So it's pretty cool. And then using mid journey for like visual inspiration, this is more intimidating. And like, again, you're feeding it prompts and it's going to create the art for you. And so I didn't want to do the hard thinking of coming up with a logo for WAIM of Stones. So I said a logo for an RPG styled board game called WOS medieval shiny gems with sparkle, cartoon style, flat illustration style without texture, flat shadows, mobile game app style, saturated colors. Okay. And so this is what it came up with.

Jason: Love it. And it like, to me, when we were doing this and we were looking at them, like clearly these were not the answer for us, but it, again, it's such a good starting point. You're like, Oh, okay, cool. This is the shape. This is where gems would go. This, you know, like, this is kind of cool. Yeah.

Caroline: Yeah. It's like, I have to use like some type of crest, some type of stones. And so I transitioned that and I just went on Creative Market and bought some assets that I could combine together into this logo. And I thought that was really like, it just gave me, it took something that maybe would have taken hours and gave me, you know, it took, I guess, one hour.

Jason: Yeah. Natalie, will you add that as a question in the Q and A. I think that'd be interesting to come back to.

Caroline: So how can you use these tools again, just to remind you if you're like, Oh, I want to play with those, too. It's like, as of now Notion AI is only available to those on the waitlist. And then mid journey is available to use free to anyone who joins their Discord. Great. So some final, some key final AI thoughts, AI tools absolutely can save you time and brain power. They're not a replacement for creativity. They're a springboard. Spend some time playing around and getting familiar with these tools if you're the slightest bit curious as it may help you gain leverage as the future of AI evolves. And again, put this through the filter of your own value system. Like I know some people were talking about the ethical concerns, which I think is really important and something that we all should do our own research on. You know, in full transparency, like we were just interested in the curiosity and exploring these things. But as we all know, the more information that you get about the ethical concerns, like the more that we'll adjust our behavior. Right. So I think just for this presentation, if you're just interested in like what these things do, it's important to know that, but then let's also dig into where does the future of these things go.

Jason: Yep.

Caroline: Now it's time for Q and A. Donna's question.

Jason: I have an affiliate question. I know someone who is interested in joining WAIM, but you aren't enrolling until Spring. I remember having the option to join when it wasn't a launch as an affiliate. Oh yeah. So, Donna, if you go into the affiliate area in WAIM at the very bottom of every page of the affiliate area, the instructions for this are right there. So that's where you'll find the answer. And anybody who ever wants to bring anybody into WAIM when we're not in an enrollment period, your answer is in the affiliate area, just at the bottom.

Caroline: Yep.

Jason: And no worries. I always click the type answer.

Caroline: Why do you do that?

Jason: I wish you guys would make that blue. I wish you would make that blue. All right. LC's question. "Is there a resource for figuring out explaining your transformation?"

Caroline: Meaning like things to help you dig into...

Jason: How to explain the transformation that...

Caroline: Got it.

Jason: Yeah.

Caroline: I'm trying to think if, where we dive into that further, because actually the transformation, I don't think we cover in Better Branding Course. I think the module one of Better Branding Course is a great place to start because I think it will get the wheels turning.

Jason: That's what I was going to say as well. So yeah, let's just go with that.

Caroline: Okay.

Jason: Module one, Better Branding Course. Lisa is your name. Thank you for clearing that up in the chat. You can find Better Branding Course. And also this is just a reminder for all WAIMers. If you click from a course in the dashboard, like you searched Better Branding Course, you click it and it asks you to buy it or what have you, you just need to log in with your Teachery information because the courses are all held on Teachery. So.

Caroline: You should never have to buy anything extra.

Jason: Yeah, exactly. Extra, extra. Read all that. Erika's question. Are there any resources you would recommend for understanding and analyzing data for beginners? I need help with understanding what I am trying to find out and then creating a cool database in Notion afterwards. Rinse, repeat.

Caroline: And analyzing data.

Jason: I think this is really an interesting question because what metrics matter for every business...

Caroline: ...is different.

Jason: ...are different.

Caroline: Yep.

Jason: So, you know, if you know, Erika, that like your number one marketing channel is Instagram for getting people to sign up for your watercolor membership/ course, then for you, it's about building a kind of like a set of metrics that you can track the Instagram, which is like posts and posts, and then click through to a certain page. And then how many people sign up for that email list and like going that whole route, following your own basic, like funnel into your business.

Caroline: I know we dig in within a coaching session on metrics. I'm just not sure which one it is because I remember the phrase metrics that matter. And so it's like deciding which metrics that matter. Maybe it actually was the Instagram one now that you say that, but it does give me the idea, Erika, that maybe that is something that we could touch on in the future that would be a good either standalone or inside of like maybe that Marketing and Promotion Spotlight Session where it's like really having an analytics section of what, deciding what metrics matter for you to track for your own marketing.

Jason: Yeah.

Caroline: I'm writing... the reason I'm talking slowly is because my brain's working and I'm trying to think I should write that down.

Jason: Write it down.

Caroline: I'm writing it down.

Jason: Becky, I know you, I know you've said you want a metric session, but I'm just always like, we'll show you how many people come to our website. And I know that's not what you want.

Caroline: This is a little, it's not like an imposter syndrome thing, but it's a little bit like, I don't want to teach something that I like. I would have to really think about how to teach that effectively because I just go like, Oh, I just look at whatever I'm trying to find out and then I go find it out. But like, I understand that that even just saying that is helpful for someone. Right.

Jason: Yeah. I think it's also a little bit of like the metrics that we track may not be the metrics that everyone else tracks. So it's like in teaching what we track may not be relevant. I don't know. We'll find out. We'll explore it.

Caroline: That's why I think like maybe the session is actually on how to decide what metrics you care about.

Jason: Right.

Caroline: You know.

Jason: Great.

Caroline: Okay.

Jason: Nicole's question. Math Nerd question, is the subscriber numbers, including current WAIMers, or do you exclude them from that number to do the conversion math? Oh, good question.

Caroline: Is the subscriber numbers, including...

Jason: We actually didn't.

Caroline: Exclude them from that number.

Jason: We actually did not exclude.

Caroline: We actually don't. And this is another thing that you'll learn about us very quickly is like, we did that whole meeting. This was like a full day. This is like so many meetings and we got really in the weeds on like all of our numbers and the conversion. I was like, Oh, well, you didn't account for this. Oh, well you account for this. And then we were like, you know what? And this is why probably this is my hang up on doing an analytics thing. And we just, we just stepped back and we just said, we're not going to get in the weeds on this. Let's just look at the number of people who were on our email, who got our sales emails actually is what it was. It was the number who got our sales emails for last launch last four launches. I think we did. And how many sales we got. And it was pretty consistently 2%. And so...

Jason: ...that's what we just went off.

Caroline: That's just what we went off of. We're not trying to be super accurate. And this is what advice we would give anyone. If its going to just distract you about getting the exact number. I dont think its that effective. I dont think thats an effective use of time. Instead, if you can ballpark it, that's going to help you get to that like you know of multiplier of I need X subscribers and we know that we are dealing with numbers where that's also why I included a lower conversion percentage so I actually if you noticed in the ideal goal subscribers I actually lowered it from 2% conversion to 1% just to be conseravative. That's kind of our view on those metric math things is like, be conservative, don't get hung up on the details and just try to do some very crude, what do they call it? Napkin math, back of the napkin math. Yeah.

Jason: Teresa's question. I have a Teachery question. In your opinion, can a combination of Teachery and Thrivecart be used as my website to sell all digital products I offer? Right now, this is planners, digital paper, et cetera, or do I need a traditional website like a Shopify site, WordPress, et cetera. If the answer is yes, can it be used for physical products as well that would require shipping? Okay. My personal opinion, as the person who originally created Teachery, is that Teachery is not your website. And as much as we would love to say, yes, you can use our landing pages and kind of like hack them together to work. It's always going to be fitting a square peg into a round hole. We're never going to have enough functionality for you to do those things that you want to do. And I think it's always going to be a little bit ahead of like a little bit of logging in a Teachery and like trying to make something work and then just kind of getting frustrated. As opposed to like, if you just pay \$8 a month, \$12 a month, \$16 a month for Squarespace, WordPress, Shopify, Wix, whatever it is, those things are made for that. Like that's what they're made for. Teachery is just made to house all of the information in a functional online course format that people go through and learn. And it's easy to set up. It's like you don't use Squarespace to build an online course platform because there's an online course platform

that does that. And so don't use an online course platform to kind of make your website and hub. Cool. That's how I think.

Caroline: That's just your honest answer. Like you could, but is it, are you going to find yourself boxed in?

Jason: It's just going to make your life so much easier.

Caroline: I think that's true.

Jason: Yeah. And we've also talked a lot about adding page builders and like other things into Teachery, but the cost of doing that from a development standpoint is not worth the return of like how many new customers we would get.

Caroline: And it takes discipline to say, we're going to just be a course platform to do this one thing really well, which is what we would all tell you about business as well as like it takes discipline to say no to new features when you're trying to, because you're going to muddy the waters in terms of like, people are going to go, wait, are you a website builder or are you an online course builder? Which is the generalist versus the niche conversation.

Jason: Okay. So this question from Natalie that I asked her to add, because I think it'd be interesting to answer. So you're welcome by the way. Natalie said, can you ethically use a tool that has unethically stolen content from others, even just for inspiration? AI art. So like mid journey, the thing that we were just.

Caroline: Right. Which I think this is a really good conversation to have, right. Because it's like, all of this is so new. And so if, and so I actually don't, don't even know where they source all of the images that they feed into. I think I just like assumed that that was sourced in a database that was sourced ethically. Do you think that it's just all like Google images, like anything that's available online?

Jason: I have no idea.

Caroline: And then my question is like, what's the difference between something being indexed in Google images and then being fed into this system?

Jason: And I also look at it this way, Natalie, like I want to think through these things obviously. And like, I want to be a good person and I want to like figure that out. But I go to this question of like, well, there are really terrible websites on Squarespace, like horrible websites that like promote terrible things. Like they get taken down all the time just because I hear that they have to deal with these things. And I'm like, well, do I not ever use Squarespace because sometimes they don't catch those websites? But just as an example.

Caroline: But the difference that I would say in that example, and this is why, like, this is what you have to think through those things is like, I think there's a difference between the core functionality.

Jason: Of what the tool does?

Caroline: Of what the tool does is sourcing, right? So it's not just someone kind of commandeering a platform for their own thing. It's like, oh no, the basis of this tool is built. So I think those are all good questions. And I don't, I don't have the answer.

Jason: Definitely do not have the answers. It's just good to think about for sure.

Caroline: So if any of you all are thinking through those things or have resources on you, like, oh, I watched a really good video that talked about like the concerns of this. I think that's super great to share with everyone. And I think we should all just continue to have these conversations as these new tools come up.

Jason: Yeah. I think one of those things too, as humans, like when a new thing happens. We use it and we try it and then we like hear from enough people that it's like, Hey, this is bad. And they're like, Oh, okay. Like I don't want to use it anymore. And so for us, like that might be mid journey moving forward. It's like, Oh, we just don't ever use that again. But like...

Caroline: Well, every person too, I also want to really fight the urge. This is like a new thing that I'm like learning in personal growth is also, I think we are now living in a time that does really send our brains to black and white thinking when some things are more nuanced. Some things are very clear, obviously, I'm not saying everything, but like, I do think that, that it's, it takes time to actually have like a more nuanced conversation and think through things. And so I'm challenging myself not to put things always in a bucket of good and bad. Although again, to be clear, there are things that are very clearly bad. And to go like, okay, what, what are the, what's the good that this tool can do? What's the bad that it can do? What are the positive implications? What are the negative implications? Like where do we extrapolate this? Right? So I think that's all really good.

Jason: Yeah.

Caroline: Yeah.

Jason: Also just really hate using Discord. So like probably won't ever use it. Rebecca's question. On the general versus niche conversation, how do you talk to the part of your brain that's afraid to make the decision to niche down and also indecisive about which way to go? I know intellectually what the benefits are, but that part of my brain says it's less risky to offer more things than to be more general. So as not to exclude anyone.

Caroline: Yep.

Jason: This, I mean...

Caroline: I resonate with this so much because...

Jason: This is something that we fought through with WAIM in the very beginning.

Caroline: This is something I fought through with Made Vibrant in the very beginning. Because especially when you're just getting off the ground, I was like, obviously I would want to offer, I can do all these things. Right. And so I thought, obviously I would want to tell people on my website, I can do your website design, or I can design your wedding invitation, or I can do your hand lettering. Like I wanted people to know that I did it all because I could do it all. And I thought that that would mean that I would have more opportunities for revenue because I really needed that revenue to get the business off the ground. I was so afraid to niche down. I will tell

you, the only thing that helped me fight the fear of niching down was that I had been doing it for six months and I had only made like \$1,500. And I just, the pain of being general, like that wasn't working for me and the pain of staying still at that place and going, Oh my gosh, if I don't make this work, I am going to have to go back and get, go back in the advertising world and get an advertising job. And that pain was enough for me to go, I'm just going to try this. I'm just going to niche down. And what I found was that in finally choosing a direction, I felt more confident about my business. Not only was it more magnetizing because suddenly in people's minds I was, Oh, Caroline does brand design now. Did you know that? And so they were able to talk about me in a more specific way. And people were able to refer me in a more specific way, rather than just being like, Oh, I have this friend who's a designer. It's like, Oh, it was like, they'd be in conversation and somebody would be like, Oh, I'm trying to start a new online business. They'd be like, Oh, do you need a brand? My friend, Caroline does brand design for people just like you. And what happened was then I would get more client leads. And then I would feel more confident. And then I think that confidence factor is something we don't give enough credit to, which is when you feel like you can communicate about your business confidently, you're going to do more. You're going to be more places. You're going to talk about your business more. So those are my tips for kind of just, I don't know, trying to embrace that. Of course, do whatever feels right to you. But if you do feel like you want to go more niche, but you're just like, have that fear. Those are some kind of things that I told myself that helped.

Jason: Cool.

Caroline: Cool.

Jason: Four questions left. Elaine's question, also I'm seeing a couple people who are chatting only with hosts and panelists. You've been chatting by yourself this entire time. Click everyone in your chat. So you can come over and be with everyone.

Caroline: Where have you been?

Jason: Elaine said, "Curious to know any pre coaching session rituals or routines, the kind of mindset and vibe you set before turning on for a Zoom call. Has it been different now that we've been in Portugal?" Oh, this is fun.

Caroline: It's fun. Okay. My first one is that whenever I am doing my hair, which is usually the thing that I'm doing right before, I don't look like this. Those of you who watch WAIM weekly, you know I don't look like this regularly. But when I'm doing that, I listen to uplifting music, depending on my mood and...

Jason: Do you have a go-to playlist?

Caroline: I don't have a go-to playlist. I just, whatever I feel.

Jason: Okay.

Caroline: And for some reason, I'm not going to play... I will tell you, but this is how enneagram 4 I am.

Jason: Yeah.

Caroline: I was listening to sad 2000s. That was the playlist. Sad 2000s. I know I said uplifting music, but that's uplifting to me because sometimes I want to be in my feelings. It feels good to me. But I listen to music and I think about my purpose. So what we listed before, I don't have that written down anywhere, but I, I just go inside and I think to myself, like. I'm going to bring my best energy because I remember why I'm doing this, that hopefully there's a handful of you who are going to actually walk away. And I'm not saying like only a handful. I know all of you will get value, but like, there's going to be a handful of you that really heard the thing that you have been needing to hear in order to move that project forward or in order to reassess your, your, your goals, or in order to get reenergized about your business. And I just keep thinking to myself, like I'm doing it for that, those handful of people that really need it right now, you know? And so that's like my pump up ritual.

Jason: Yeah. Mine is like a 2000s hip hop playlist of some kind.

Caroline: Did I hear some 50 cent In the club?

Jason: You did. Yeah. And also there's some really terrible lyrics and some of those songs. And so I'm like, Ooh, next, like, this is just like really cool.

Caroline: The 2000s. They were...

Jason: But yeah, that's what I turned on when I'm setting up all the gear and like all the things because that takes like 15 to 20 minutes. And then honestly, a lot of times it's, I'm trying to bake something on the day of coaching because it just like our brains have been so into the coaching session and so focused that I like a little bit of looseness before sitting down here. And honestly, for the 40th time, like it doesn't feel very uncomfortable to like turn on the thing, but like 20

sessions ago, it still felt, felt a little bit unnerving to be like, okay, like 200 people signed up to like, see us and like, whoa, how's it going to go? It's like, that would help like me kind of like take it out a little bit. Hasn't really changed much from being in Portugal though. I will say same ritual that we had before.

Caroline: Do you ever resist upping your income goal...?

Jason: Sofia's question.

Caroline: Sorry, Sofia asked, do you ever resist upping your income goal because you don't want to be trapped at that higher number in the future? Meaning trapped at, I guess the question being like...

Jason: Maybe that's like, Sofia, one of the things we talk about is like your enough goal does not have to be forever. And so like for us, like our very tangible example for this is in 2018, our enough goal was \$33,000 a month. When we hit that goal...

Caroline: Got it, I got it, got it. Okay. That's helpful. So meaning, are you afraid to raise it because then you're sort of always held to that goal? And I think why my brain literally didn't understand the question is probably because I just don't see, I just don't see going backwards as a step backwards. Like if your goal goes down, like I truly don't see that as a step backwards. I see that as a realignment of like, Oh, in this season of my life, it requires less money to live in the way that I want to like, really. And I just think that's a mindset shift in that. And that happens when you stop playing anyone else's game and stop going like, Oh, the, the direction of this increase is a measure of whether I'm moving forward, how people see me, whether I'm successful, like when I stopped considering that how other people view my success is, is, has

any dependency on whether I actually am successful, that's when I stopped caring. I was just like, Oh, this year I want to make this. Next year, I'll make less. Two years from now, I'll make double. And then I'll go like, it's not always like a straight line. And so I don't ever fear trapping myself in that income goal because I am totally okay with it going up or going down. And so I don't know if that helps at all, but that's just like a mindset thing that it doesn't happen overnight by any stretch of the imagination.

Jason: Great. I'm going to let you answer Christie's question, who also said in the chat, you guys should have cookies, even though you went over. Those are not the words that she wrote. She didn't say that because that's how I'm reading it.

Caroline: Oh, she's saying the opposite.

Jason: Sure.

Caroline: Is it like WAIM of Stones? Like we showed up and so we get the stone, we get the Cookie Stone.

Jason: I'll let you read her question and I'll enjoy the cookie.

Caroline: How much time do you typically spend making these Notion workbooks and Google Doc workbooks and any tips to keep yourself to a reasonable amount of time? I want to implement something like this for my group coaching, but I can see myself spending way too much time on it or do I have to wait until the end of the year for that teaching live session session? To be honest, the Notion workbooks themselves is about two to three hours, I would say. The Notion part, not these coaching sessions. And that's only because I don't know if that

seems like a lot. Yeah. I don't know if that seems like a lot or not a lot, but it'll actually be a lot less in the future because the hardest part about this one was like, it was a new format and I was trying to decide like, what do I want it to look like? I get that down to probably an hour, like all of last year, I could do the Notion workbooks in an hour because I already have the exercises because I've figured out the coaching session. So I'm just going like, okay, I'm going to do an offer math. I'm going to do an enough number section. I'm going to do with this section. So I write that out and then I just have to put it into Notion. But to answer your question more specifically, I think it comes down to give yourself like what amount of time feels doable for you. Does one hour per feel doable? Then time yourself and go, what could I make in one hour? Like truly spend one hour and go, what could I make in an hour? And then go, okay, do I feel like that adds value? Do I feel like that's something that would feel sustainable for me to do over and over? Like really test run it. And then if you go, Oh gosh, I said an hour and I didn't even get, I don't even know. I didn't even get a title. I didn't even get anywhere. Then go, okay, maybe not yet.

Jason: The other thing I would say here, and this is not just for Christie. This is just as a reminder for everybody. If you look at our workbooks and you go, I want to make something like that. Remember that this is the 40th coaching session that we've made workbooks for. So if you want to see what our workbooks actually looked like, maybe go back to the very first coaching session and check out the PDF version.

Caroline: I mean actually I went way harder on the earlier ones in terms of time. So don't do that.

Jason: Those were designed not necessarily like ease of functionality and doing it.

Caroline: I'm just saying like, that's also not a good standard.

Jason: Yeah. But I just meant to like, look at it to be like, Oh, well this is like overly complicated. Like I would just make a fun version.

Caroline: Exactly.

Jason: All right. The last question is from Jacqueline. Switching my website from WordPress to Squarespace and saw that they now have 7.1 versions of all the templates. Do you have any thought on which new template is amazing?

Caroline: Oh, so the thing about 7.1, is it, they all kind of can fit together. So they're all just using the same pieces to my knowledge. So I don't off the top of my head, I'm not acquainted with the new templates that they've done, but I think one of the coolest things about 7.1 is that you, you can always use all pieces. So it used to be in Squarespace that like some templates would have some functionality and others wouldn't, but now I think all the functionality is available everywhere. Yeah, exactly. All 7.1 templates have the same features, which is really great. Thank you. So I don't know, does anyone-

Jason: But I didn't want you to eat. That was the thing. I put it over there so you wouldn't be chewing and talking.

Caroline: Well, who would know that? You put a cookie in front of me and wanted me not to eat it, but you wanted me to know that I wouldn't eat it right now?

Jason: Yeah, because we're in front of our friends.

Caroline: Okay.

Jason: Yeah. You know, like I didn't want to. All right. That's the last question. Becky, thank you for keeping track of the time. Technically it was, you know, two hours and 22 minutes, not two hours and 30 minutes, you know, just saying, I'm just trying to make these things shorter. But I do think that we are going to learn from this session. We hope you enjoyed our very first Spotlight Session and that you got some value out of this different format. Love that you showed up, all of you. This was kind of fun. This was our most highly registered session. I think maybe ever.

Caroline: You didn't tell me that. I thought, I would have been more nervous.

Jason: This is definitely a really fun one to kind of like us to figure out how to consolidate all the things that we've taught in 39 coaching sessions into these 12 over the year.

Caroline: So many exciting things to look forward to. Narticles. We're going to update you on that.

Jason: Yeah.

Caroline: Dashboard stuff. We're going to update you on that.

Jason: WAIM of Stones. It's going to be here before you know it.

Caroline: WAIM of Stones..

Jason: Some of you are going to get stones, that Apprentice Stone. Some of you aren't. Some of you are going to be so sad. You're going to have seven stones by the end of the year and you're going to say, I missed out on that one stone.

Caroline: You know that you're doing it just for fun. But the Enneagram 4 in me is feeling really sad for like you're making it too real. It's okay if you can't do a stone one month. Okay.

Jason: It's WAIM of Stones. Like you either show up or you ship out. That's what the tagline is of WAIM of Stones.

Caroline: Together, we have a great balance.

Jason: Yes.

Caroline: Because I'm sad for people who won't be able to get all 12 stones or eight stones. There's not 12, there's eight.

Jason: Yeah. Also, please don't sue us, Marvel. All right, everybody. We appreciate you. You're amazing. We are so thankful that you show up to these coaching sessions, that you're here as a WAIMer, that you support other WAIMers in Slack. And we are just grateful to have you. So we will see you around Slack. We'll see you in your email inboxes. We'll see you in other places. And we'll be back here for another coaching session in February. And remember, later start time for February session. So just commit that to your memory.

Caroline: Later start time for February. Thanks for being here.

Jason: I'm going to go eat that plate of cookies. The whole thing. I'm not going to do that. I'm going to be very sick. I'm eating like five of them. Is that okay? I've already had five. That's too many because I made them today. I have to eat them all.

Caroline: You made them. You eat them.

Jason: My life is my bake. That's what I live by.