The Simple Framework That Changed My Leadership Style

() I've built a business process powerful enough to turn an antisocial introvert into a thoughtful people person. And I'm doing this because I really want to prove that business process isn't this boring operations thing to throw in the corner. It's a powerful tool you can apply to any skill you're looking to learn, even once, as human as human relationship building. So we'll start on the whiteboard, or maybe the digital one. But before we can really start diving into tools, we need to answer one key question, which is Where the heck are we going to put this information? () So as with any tech hunt, I went through three rounds of searching. First, I searched my existing tools. Does anything I currently have have this functionality in it? In terms of a proper CRM, I didn't have one, so that was a no. Number two, I checked to see if there was any integrated tools, anything that would work with the tool I already used and be available to me. I knew most of my communication would probably be through email, LinkedIn, and phone, so I was looking to see if my tools for those things had any integrations in common. And missive, the main place that I do my email in, had a few options, but honestly, at the price point, and considering this was more of a personal project in some ways, none of them really made a lot of sense. So that brought me to option three, which is the DIY route, meaning use a tool I already have to build my own DIY customer CRM. Unfortunately, I do actually have some I've no code tools at my disposal. I've got ClickUp and Smart Suite and other pieces. Now, I use both of these tools. That's not something I would recommend to the average user. So because I'm in this position of deciding ClickUp versus Smart Suite for my CRM, what I might do is consider the key features of the two. And I actually have a whole video on that up at the top here where I go over the key differences. So I know, based on my experience, that Smart Suite will actually be the stronger choice in terms of CRM just because of the features it has. Could either do this function? Absolutely, either could. But since I've got both, I might as well use the one that's better suited for this position of a CRM, and that is Smart Suite. And of course, if you'd like to try either of these tools, I've got links to all of them in the description below for your viewing pleasure. But anyway, we are going to move forward with Smart Suite here, and the The next question that's going to come up is, how are we going to build something in () Smart Suite that will function as a CRM? Well, that's something I can actually break out here on the whiteboard. I know that every CRM just has two components. You know how I know this? Because I made a video about this too. Watch it up here. But every CRM has two components. It has a log of people, yay. Actors, people that you are looking to keep track of, and then it has a log of contact points. So moments that you've had a conversation, messages that have been sent. We've got actions. So we've got a log over here. And then over here, we've got accounts or people or companies. In this case, we will just call them humans because that feels accurate. And when we take the humans over here and the log of activities we do over here and we connect them together, which, yes, there are going to be many logs per human, that is when we get CRM magic happening. So in Smart Sweet Land, I know if I want to make a CRM happen, I need to build at least one spot to log information, which will be one table, one database, and one spot to track humans. So this combination of a human's database and a log database is something you would have inside any no code data tool. So when we think about things like Notion, Mondi to a smaller extent, Coda, you will have the same structure. If you're in a task management tool like Asana, Todo, ClickUp, your structure is going to be a bit different. But I know these are the two pieces that I need to build. So with that, let's get ourselves over to Smart Suite and start building this out. () Now, what I could do is go into Smart Suite here and either use their AI generator and just describe what I'm looking to build, or I could use one of their templates and I could just search for CRM and see what the options are available. For each of these, I could give it a click, check out what they've got going on here and see, is there anything else I want to add to this puzzle? But I'm a bit of a snob when it comes to how I have things set up inside my work management tool, as you might imagine, it's an occupational hazard. And one thing I don't love about the built-in CRMs inside Smart Suite is that they all focus on individuals for whatever it is, whether it's the partner CRM or the personal one. You've got people. And then when it comes to tracking actions around those people, it's all tracked inside the name itself. So either it's a sub-item, it's a comment, it's something baked in, which is totally fine. Except if you ever want to have an interaction or a moment that interacts with multiple people at once, it means you have to track it multiple times. And I am far too lazy for that, and again, a bit of a snob. But fortunately, this is not the first time my snobbishness is raising my head, and I've actually already built out my own custom CRM for other functions inside ProcessDriven, which I'll give you a quick peek into now. Now, you may or may not know this, but we do have a We have a membership here at ProcessDriven, and it's a small membership, nothing crazy, but I like to have a log of all the activities that happen in the community and who our people are. It allows us to maintain a member directory that's far more detailed than what our membership tool allows us to do. So anyway, we already have this two-part CRM. We have the log of activities, and then we have the list of humans. What I'm going to do for this CRM build out is I'm going to take these two tabs and basically just make my own copies of them. I'm going to duplicate this solution. I'm going to not include anything in it. I'm going I'm going to duplicate it in the same workspace, and I'm going to call it CEOCRM. What that's going to allow me to do is take all of the stuff I love and none of the stuff I don't and pull it into this new solution. So it should show up here in a second. Here it is, and it is ready for work. I'm going to then delete the stuff from the membership that I don't need. It's already copied elsewhere. And speaking of Ion, if you want to steal this template, because this is something () I just whipped up for us internally here, we actually have it inside the the Ops Network member library. So if you become a member, you can snag it in there. And then I can start fresh using the CRM components I enjoy. So in this case, it'll be humans, not in the Ops Network humans anymore, because we're not just talking about the membership, and then interactions log. Are quite basic. Here in the general information section, which I've created, I have all the enduring information about a person, stuff that does not change, that I might not need to reference very often. I've only stored the information that I could see myself reasonably needing to locate, such as if I'm heading to Toronto for a trip, it'd be great to know who else lives in Toronto. That'd be great to see there. I know some people are just good at memorizing this stuff. I am not. So let's just not play to my strengths and let's track it. Below here, I just have a little attachments area in case there are any images for some reason I would have. But that is that. General information all created inside a section in Smart Suite that I'm going to keep collapsed by default because I like things to look very nice and clean. Above this, I've got four pieces of information above the fold. The bottom The first one is key info or relationships. This is just a sub-item field where I can track anything and anything about it. So for example, I could go in here and I could say, Hey, this person has a dog named Ollie. They're an American Bulldog, and just add that. I could also say that they have house plants, and I could say, Love plants of all kind. Gift idea for the future? You know, anything I want to keep track of, I can just put that here as just a freestyle space to take notes. And And it'll track which day I updated it to as soon as I save. Above this, I have the interaction log, and this is the most technical () piece, I guess. So that relationship field is where I connect this human over to the interactions log. And we'll talk about that in a second, but leave it to say that's the connecting point. Above that, I have status. So I struggled with these a little bit. I don't know what the statuses are for networking. So I just put stranger, you partially know, like and trust them, you fully know, like I trust them. And then someone who's like, You know what? We're just oil and water. Best of luck to you. We're not a good fit. And so I'm not too worried about staying in touch with you. Those are the four statuses I put in here. I'm going to use these to help me keep track of how often I want to interact with somebody and just prioritize. Right here is how I will know how long it's been since I have last interacted with somebody. This is a formula field, which you can see how it works right here. () It's just tracking how long it has been between the latest interaction date Date and today's date. So that's all it does. And you are free to copy this if you so choose. But what that will do is it'll take whatever dates we have logged here in interactions and do some quick math for me and show me the number of days here. This can be It's thoughtful because then I could sort, filter, color code by people who I haven't stayed in touch with as much as I'd like to. But to really understand this, we need to talk about this. So let's go into the interactions log and show you what that side of things looks like. () And I'm sure that'll need a little bit of love as well. All right, so after a I'm just a little re-arranging, this is what our interactions log looks like. It's very simple. It's just got a place for me to write some text or add a diagram or add an emoji or hell, I could even put a whiteboard in here. Once I do that, I can connect it to the human or humans that are relevant. In this case, I only have one choice. I'm going to link John here. Below this, I have a date for when the interaction happened, which let me just rename for clarity. Interaction Date. And below that, I've just got the ID or the task. That is doubling as the record title, the title of the overall entry. And so this is pretty much it. So I could just type in whatever I want here, such as, saw at Atomicon 2025 while presenting, which by the way, I'll be speaking at Atomicon. See me there. I'm going to click Save. So Now, every time I have a new interaction, I can log it here. If I happen to not be in Smart Suite, I can also use this form I've created here () to log the interaction as well. I'm going to zoom out just a little bit because I think it's easier to see. You can see the form allows me to do the same things. But with this, I can actually take the link to this form, so it's shared here, take this link, and then I actually made my life even easier by going into my settings on Chrome and setting it as one of the default pages that shows up on my browser when I log in. That way, even if I'm not logged in a smart suite, I can log this information. And don't worry, I'm going to regenerate this code after this video, but that just makes this more convenient. By the way, if you're in a business context and you're trying to figure out, how do I get my people to use my tools more often, creating forms like this is a great way to make that possible. All of this was shaping up to be a beautiful plan. I had a beautiful strategy for how I was going to build out these relationships. But there was just one problem in my transformation from caterpillar to social butterfly, which is that even though this plan was beautiful, I knew myself, and there was no chance I was going to go look at the CRM unless prompted. So that brings us on to the next phase. Data alone is not going to drive action. () What is are promises, promises to to a timeline, to a schedule, and promises to do a certain thing, at a certain time, are what we call around here, process-driven tasks. So if we really want to accomplish this outcome here, we can't just have data to guide us. We need a task to prompt us to look at the data to ultimately do the task. Oh my gosh, this whiteboard is so messy. But messy whiteboard aside, the question now becomes, what tasks do we need to make sure that this data is used to create action. So in terms of tasks, there are two that I think are going to be useful for me. Number one is going to be a routine task to check for interactions. So at a set repeating interval, I'm going to head into my CRM and I'm going to check for the last interaction date. And anyone I haven't had any contact with in a certain number of days, let's just say 90 days, then And that's going to require me to take action of sending a message, following up, something like that. So I'm committing that if there's no contact in 90 days organically, I'm going to take action to fix that with this routine. And if it's been 90 days without action, and I'm like, Oh, God, the idea of staying in touch with that person is not going to be fun. The alternative path I'll give myself is to change the status of a person. So if the idea of staying in touch with them sounds terrible, maybe they're the wrong status, then they should actually be the not a fit status instead, in which case I will not worry about it. So to repeat that back, anyone who is a fit, who I haven't interacted with in the last 90 days, this is going to be an action to stay in touch. And if that idea gives me dread, I should probably change their status to not a fit. That is my first routine here that I'm going to do, and I will check in on that, let's say, every 30 days from the time I complete it. Number two, the second routine I want to establish that I want to put inside my task management system of some kind is metrics, because I know for me, metrics motivate me. And so what I'm going to do is create a routine, let's say every 30 days. Is that too much? Let's say 30 days again. Every 30 days, we're going to pull metrics on how I'm doing on this effort. And by the way, I realized I'm going quite quickly over all of these different areas. If you wanted me to dig deeper into any of these phases, the process mapping, the CRM build out, the task management, if you want me to go deeper into any of those three, just leave me a comment below and we can make a part two video on those specific pieces. But at this point, we've finished task management and we're on to the very last section, which is essentially answering the question, is this business system going to work? And just like business systems in business, the answer is, I don't know. The only way to really know what is working and what's not is to measure it. And we can't just sit here and measure it from our mind, from the arm chair. We need to measure it from experience. And so I needed to define the metrics that I wanted to be checking in on in that routine I created. So in this case, I defined three metrics that I thought would well reflect () whether or not the system is working. Number one is the number of human beings in the system. Number two is the number of humans that I actually like in the system, because ultimately I need people that I would enjoy spending time with, but I also want to be open to new human beings. So both of these counterbalance each other. Quantity, quality. The very final piece is my leading metric, the thing that I control which is the number of logged activities, meaning the number of touch points. If this is a gym tracker, I would say this is how many times I went to the gym. But in this case, because my goal is to make reaching out to people and staying in touch my habit, that's what I'm going to be logging, is how often am I reaching out to people? Because I recognize that if I really want to build this incredible professional network, I need to not be so self-contained. I need to not just live in my own little world. I definitely need to make more of a habit of getting bring these kinds of social outreach into my flow, which is where the logged activity piece is going to come in. All right, so just to bring it all together, I've whipped up the CEO CRM () dashboard, which is a bit of a mouthful. Put a little banner up at the top. I'm going to skip the navigation bar, even though that could be cool to jump to different sections. It's not really necessary for this internal use case. To this dashboard, I've added four different widgets of some kind. We've got humans by status, which will show me all the different humans and where they're at in the status queue. Interactions over time, so how many interactions did I log by each month. Then I've got two comparison metrics that just show me interactions this month and humans this month compared to previous months. And yeah, that'll be a wrap. That's our dashboard that lets us see these metrics that I just want to check in on at a set interval, but these will be automatically generated by Smart Suite as data comes in. Now, the only real test is to work this system, wait and see, and check back in in a few months to see how this system has really helped me change my professional network. Now, if you'd like to see the results of this experiment of using the system for a few months, write the word part two in the comments below, because I created this with you here today. I'm going to be using it for about two months by the time you watch this video. If you'd like a part two, I'd be happy to release it. If you are new here, be sure to subscribe and watch this video on the end screen that provides an overview of what ProcessDriven is all about. And now that you're here in our little corner of the Internet, I want to end this video the same way I end all the videos here on this channel, which is with a gentle reminder to enjoy the process.