**18.06.2025 - Video\_Transcription**

[Attendee 9] (0:06 - 0:08)

Sorry, we were just chatting.

[Rachael Davis] (0:08 - 0:12)

Hello, hello. Did I make some juicy gossip there, Catriona?

[Attendee 4] (0:12 - 0:20)

No, not at all. We were just chatting about Jackie's just been working in China, so it was just that, but I didn't realise you were on, sorry.

[Rachael Davis] (0:20 - 0:24)

It's alright, I'm here, I'm here, I'm interested, I'm intrigued. Jackie, what was China like?

[Attendee 6] (0:24 - 0:25)

It was wonderful.

[Rachael Davis] (0:26 - 0:26)

Yeah?

[Attendee 6] (0:26 - 0:37)

Enjoy it? Yes, I really enjoy it. The people there are really keen and interested in everything and it's a great place.

I think it's the place of the future.

[Rachael Davis] (0:38 - 0:39)

Wow, whereabouts did you go?

[Attendee 6] (0:40 - 0:44)

I was staying in Nanjing, but I also worked in Beijing, so I was in both.

[Rachael Davis] (0:44 - 0:49)

Wow, that's amazing. I've got no experience of China at all and one day I need to go, don't I?

[Attendee 6] (0:50 - 0:53)

Yes, you do, you do. I think you'd be surprised what you found.

[Rachael Davis] (0:53 - 2:00)

Yeah, yeah. Oh, great. We can chat about that in a minute if we get time.

Welcome everyone to Midweek Mentoring. Can you bear with me a second while I just secure my animal, because otherwise she's going to start barking. There we go.

Shut the door on her. And we've got two people on Midweek Mentoring this month and that I've got is Mark, you're one of the chaps. Yeah, put yourself forward.

And Liz, is Liz here? Give me a wave, Liz. Is she on the call yet?

No, she's not here. Okay, well, we'll see. She's meant to be on the call, but we'll come back to her if she, maybe she'll join in a short while.

So if anyone else, I've only got one slot at the minute, so if anyone else wants to ask questions after we've done Mark, then please feel free if Liz doesn't turn up. Because actually her question was a really interesting one about making the most of the championship season, which I think everyone probably wants to do. So we can have an open discussion about that afterwards if you like.

Mark, do you want to talk about yours? Because I think it's software related, isn't it?

[Attendee 1] (2:00 - 2:01)

That it is.

[Rachael Davis] (2:01 - 2:02)

Yeah, go on, hit me.

[Attendee 1] (2:03 - 2:31)

So we obviously got staff and when something comes up as a bit of an issue, it's who then becomes liable, like who's responsible for it? And it's just having a bit of software to say, this is the person that's responsible for it and has it been ticked off. So we're after a bit of software or a system where they're accountable and we can see whether or not it's been ticked off or not.

[Rachael Davis] (2:31 - 2:50)

Yeah. Can you just talk me through to give me some context? When you say issue, what kind of the, tell me a little bit more about your team and tell me about like what they do, what are the different teams and what do they do?

And then what are they responsible for? What projects, things are they managing? And what are the, like, give me an example of an issue.

[Attendee 1] (2:51 - 3:27)

So we generally have between 10 and 14 renovations or deals on the go at any one time. So we're pulled from pillar to post. Say if I found a potential like water on a property that we just refurbished and Martin put into the group, or can someone speak to Clear Springs to go and investigate?

And normally that's like Martin's kind of any like maintenance type of stuff is normally Martin. And then no one actually done it because everyone else thought someone else was going to be doing it and then it turned out to be a problem.

[Rachael Davis] (3:28 - 3:38)

Yeah. Because WhatsApp can be, one of the things I think you find in business is that WhatsApp is really difficult sometimes to manage. It's not, it's not a management system, is it?

Because things get lost in the ether.

[Attendee 8] (3:39 - 3:39)

Yeah.

[Rachael Davis] (3:40 - 3:54)

Yeah. A hundred percent. And lots of people are asking or saying different things at once and everyone just thinks someone else is dealing with it and it's not getting done.

I get that. So when you say you've got like, is this 15 projects a month that you've got and these projects are houses basically?

[Attendee 1] (3:55 - 4:01)

Yeah. Or blocks of flats or like the one I was talking about is 10 flats being refurbished.

[Rachael Davis] (4:01 - 4:38)

Yeah. Right. So you, I would say that your, the project that you're managing is a, it's got it's a project is the name of the block of flats or wherever it is, the address.

It's like a place, it's a physical thing. So that is what I'd class as a project for you. And then it's who's doing what.

So in that, obviously you've got different people doing different things. So someone's obviously doing the refurbishment. Somebody's managing the supposed to be managing the maintenance or any issues that come up.

So you've got like the management of the, the, the project management someone's doing is separately. Is that separate to that? You've, you've got, have you got different people working on the same, on the same project?

That's what I'm trying to ascertain.

[Attendee 1] (4:39 - 4:50)

Yeah. So it's me, Martin and Aaron. Yeah.

That kind of spearhead the business. Aaron's more the backbone and does more of the emails and everything and the backend side of things.

[Attendee 9] (4:50 - 4:50)

Yeah.

[Attendee 1] (4:51 - 5:25)

Of the business. So normally it, it kind of generally falls on Aaron's shoulders, but it's so busy at the moment. We've got him a member of staff.

Who's the, who's a VA or PA to Aaron. And like, you know, I've talked to him about getting potentially another one because, like they're just so busy. Just like planning applications and stuff like that.

The ideal world would be like everything then falls to Aaron or somebody below.

[Rachael Davis] (5:26 - 5:32)

Yeah. So he's got certain projects too. So for each house, there's certain people who take on certain things.

[Attendee 1] (5:32 - 5:36)

No, Aaron just looks after the entire lot.

[Rachael Davis] (5:37 - 6:15)

Right. Okay. So that's why he's overloaded, isn't it?

And he's got too much to do. So I think what there's, there's a couple of things here. I think that from the sounds of it, it's not a lead generation tool that you need.

It's a task management tool, isn't it? Because the lead generation tool is about how you get, how you get attract people who are interested in doing projects with you, how you attract investors, how you, how you find the deals, all of that. It's like your lead generation or wherever you get that, that those sources coming from, but that's, this is not what this is about.

This is once you've got the project live and it's up and running, like your block of flats, it's about who manages what and who's responsible for what.

[Attendee 1] (6:16 - 6:16)

Yeah.

[Rachael Davis] (6:16 - 6:17)

Would that be right?

[Attendee 1] (6:18 - 6:28)

Yeah. It's so obviously about contractors and bits like that. And moving forward, we'd like to get a main contractor in to then oversee all of those.

But at the moment, Martin's doing that.

[Attendee 9] (6:29 - 6:29)

Yeah.

[Attendee 1] (6:30 - 6:48)

I generally oversee the company as a whole and trying to push it forward. But so I'm trying to get out of it as much as possible so I can work on it, but I can get back in and I'm now responsible for finding future projects, although that's kind of a bit of everybody at the moment.

[Rachael Davis] (6:49 - 6:50)

Can I ask another question?

[Attendee 1] (6:51 - 6:51)

Yeah.

[Rachael Davis] (6:52 - 7:19)

When you, you know, when we went through the P blueprint and we talked about team and capacity, and I know you've taken on quite a lot of people over recent months, did you do an organic, you know, have you got something that clearly did? Because I feel like you might be missing. The first step in this is to make sure everyone in the business is 100 percent clear on what they're supposed to be doing.

[Attendee 1] (7:20 - 7:23)

I actually drew that yesterday. There you go.

[Rachael Davis] (7:24 - 7:24)

Right.

[Attendee 1] (7:24 - 7:25)

Yeah.

[Rachael Davis] (7:25 - 8:56)

Yeah. So I think that before you get a task management tool, which I'm going to recommend Asana because for me, Asana is a great tool and I'll tell you, I will walk you through how I suggest you use it. You need absolute clarity on the first step.

It's really easy in business. We talk on PE about perfect execution, right? And the perfect execution is you get everything done in the right way.

And it delivers the results. But in reality, when you join PE, you've got a business already up and running and there's things that you've missed. You know, we talk about not skipping the gears.

We do skip the gears and we found ourselves in a position where we actually need to backtrack and actually sort out the fundamental problem. I think when you're all talking on WhatsApp, if no one's 100 percent clear on what they're supposed to be doing or what they're responsible for, no wonder things are getting dropped. So I think the first thing is that you make sure your organizational chart has you in it, Martin in it and Aaron and the rest of the team and the main contractor.

So where you're trying to get to. Right. So what you're, you know, I don't know, an organizational chart that's fit for the person for the next 12 months.

If you're going to bring on a contractor in the next 12 months and that needs to be in the organizational chart. However you're planning to do it, have the whole thing visioned out. And then for each person, you need to go a little bit, a little step further.

Remember, we did this in the in the classroom, like on PE, where we talked about laying out each person's responsibilities. So you could be the head of sales and marketing, for example, Mark.

[Attendee 8] (8:56 - 8:56)

Yeah.

[Rachael Davis] (8:57 - 10:03)

And Martin could be the head of operations, as an example. But what exactly are you covering in sales and marketing? What are your responsibilities?

What are Martin's responsibilities? What are Aaron's responsibilities? Because Aaron might be responsible for planning and planning, submitting planning applications for doing your finances.

Unless you've got a bookkeeper who's doing all of that for you, whatever, you know, back end activity. You need to be very clear on what each person is responsible for. Just bullet point.

You don't need to write an essay in these things. It's just clear, concise organizational chart where everyone sits in the business. Who else do you need to recruit?

And they're in the business as if they're, you know, you know that they're coming in the future. And you might want to back up plan for what if you haven't hired them yet, who's going to be looking after in the interim. But everyone's clear on who does what.

And then the second page of your organizational chart should be one that lists out everybody's responsibilities. You know, like the things that I've mentioned, you know, when there's a leaky tap, all maintenance for every project sits under Martin. Like, you know, whatever it might be.

And you need to just have some clarity there so people know what they're doing. That's the first step.

[Attendee 8] (10:04 - 10:04)

Yeah.

[Rachael Davis] (10:05 - 10:22)

Start there, because without that, you're going to still continue to have problems. Then what you can do is you can build out something in Asana. Asana is a task based project management tool.

So, for example, I would use it in your sense each. So say you're one of your block of flats. What's it called?

[Attendee 1] (10:23 - 10:24)

Glanville.

[Rachael Davis] (10:24 - 10:24)

Glanville.

[Attendee 1] (10:25 - 10:25)

Yeah.

[Rachael Davis] (10:26 - 11:53)

So Glanville is a project. It's added in Asana. Glanville is the project.

Everything of every task needs to be built out for that project to actually come to fruition. So you could build it into sections. The first could be planning.

That'd be section one. And underneath that section, you'd have lots of tasks that are linked to getting planning approval. Then from that, you might have the build out.

So, you know, whatever, you know, whatever goes into the build out. So if you're, you know, if you're taking it back to brick and refurbing every single flat, you might be doing that in a sequence. So you might be doing like flat one first and then flat two, flat three, however you want to do that.

And what goes underneath that, what's required and the scope. And that's basically your scope of works. And in less detail than a scope of work spreadsheet.

But, you know, just the main milestones, the main tasks that need to be done in that section. And then that leads on to the next piece, which might be the refurb, you know, the fitting. So the fittings all go in there and then.

But on each task, there is someone who you can name that's responsible for it. And you can give them that task in Asana and they then have their own task list and they know exactly what they need to do. So then at that point, where instead of putting it in WhatsApp, the problem with the leak would go into Asana and you would on the project and you would assign that issue to someone.

So it would be added in as a task and then assigned to someone and they would be responsible.

[Attendee 1] (11:53 - 11:57)

Is Asana available on a mobile phone? Yeah. Is it like an app?

Yeah.

[Rachael Davis] (11:57 - 15:03)

Yeah, you can. You'd have to have a look at how you build it out. So you'd need to play around with it.

Some of these things. This is the bit where this is why midweek mentoring helps, because perfect execution isn't what isn't what happens in practice. You might find that you build a project and it doesn't quite work right.

You're going to have to fiddle with it and change things so it fits better for you. But the main idea is that from start to finish, you've got a project. You can assign different people to that project to do certain parts of it.

You can even split it out if you needed to and do like the refurbishment and build is one project and the management of the paperwork and everything else is another all the maintenance. But I would say it's better to keep it all in one so that everyone's got visibility of it. I can give you an example.

I'll show you one in a second. Just for me, a project is different for everyone. But for me, a project in Asana is a is a tenant on boarding and a tenant off boarding.

I have a there'll be a girl's name or a boy's name. That's the name of the project. And it's just a check in process or a checkout process.

But there's like 70 steps in it. Some of them I do. Some of them my assistant does.

It's the same for you. You'd have this massive project. But in it, some of it you'd be responsible for, Mark.

And then then Martin would be and then Aaron would be. And you'd all be involved in it in some way. But everyone would be clear on what their on what their actions need to be.

The free version is pretty good. You can assign tags to it and a priority to it. But there's the paid for version of Asana.

One of the things you might find beneficial is it's got an approval process. So what I mean by that is that in Asana, if there's a if there's an approval, so something needs to be done first before you can move to the next phase. It won't allow you to to complete it and go forward until this section is done.

So sometimes the paid for version is worth paying for. If it's really important that you stop people from doing certain things until one thing is completed. Yeah.

It depends on how complex your project is. So I would definitely review the free version and the paid for version to see what works for you. For me, I'm using it simply for a check in and a check out project process for my for my businesses.

So for my property businesses and that's, you know, I'm not putting like the refurb project through it because I've done all of that. I mean, I haven't built out a new HMO in a long time, but that's what I use it for. But it's really good for a start to end project.

Yeah. And yours is a start to end. There's a point where it's you start it and there's a point where you finish it.

And it's brilliant for that kind of stuff. And everyone knows what they're supposed to do in between. But yeah, that I think you pay you pay extra for the approval process.

It actually it's got like a sequence in it. So it will send somebody an email automatically or a message to say, you need to complete this process next because somebody is waiting on you. And that's what the paid for version does.

There's more automation in it. The free version doesn't give you that automation. So it just depends on whether you need it.

[Attendee 1] (15:04 - 15:09)

Does that make sense? Yeah, it does. Can it email multiple email accounts?

So we've.

[Rachael Davis] (15:09 - 15:09)

Yes.

[Attendee 1] (15:10 - 15:10)

Multiple. Yeah.

[Rachael Davis] (15:11 - 15:21)

I think so. You'd need to check that. A couple of tips.

Whenever you're doing something new, you sometimes you've just got to email the customer service team. If you're not sure they're all pretty good.

[Attendee 8] (15:22 - 15:22)

Yeah.

[Rachael Davis] (15:22 - 15:49)

Come back to you within 24 hours. If you can't get an answer clearly from trying to look at the sale. You know, sometimes when you're looking at a sales page on a website and you're trying to think whether this product works for you, it can be hard to tell whether it does what you want it to do.

And the only way for you to learn is to try it and try to give you as much information as I can. But I think that you can. It will automatically email whoever's on the project and you can put multiple people on it on a task.

You can assign multiple people to a task.

[Attendee 8] (15:49 - 15:50)

Yeah.

[Rachael Davis] (15:50 - 17:25)

But yeah. So you just need to work out whether you need the paid or the free version. The paid version can get fairly pricey if there's more than one seat.

I'm sure it's £10 a seat. So just have a look at that. But you might want to trial run the free version first and just put one one project in it.

My advice to you on this is get a chat GPT to help you. Where I had to build my onboarding process from scratch by myself. Now you can ask chat GPT to build it for you.

So say just tell you what you're trying to do and get it to build a list of a number of tasks associated with what you're trying to achieve. And it'll build it out for you. It's just a process for doing what you do.

And that's it. And then you can then take that, build it in Asana and then assign people to each individual task. I'm going to show you an example so you can.

So bear with me while I do this. I'm going to share. Where's my share screen?

Oh, there it is. Asana. Let's see if I can get this to play.

Right. So I mean, I'm in Asana at the moment. So this is just my Sunday sanity.

Yeah. Which is here. Bear with me a second because I've got it on my small screen and not on my big screen.

It does throw me a little bit sometimes. Just going to try and find a project. Here we go.

[Attendee 1] (17:26 - 17:28)

And is this the free version or the paid version?

[Rachael Davis] (17:28 - 18:07)

Mine is the free version because I don't need. I just don't feel like I need it because there's just two of us working on it. So I think potentially you might need the paid for version just because you've got a bigger team.

There's more of more of you, but you might not. That's the best advice I could give is you can try the free version and see if that's enough. If it's not.

But what you do need to understand is what the paid version offers you. And I think it's automation on tasks that have been left undone. So it does more automation.

It will remind people that something needs doing more frequently. You get emails from Asana on the free version, but I think it builds in more automation if you do the paid for. So just have a look.

[Attendee 1] (18:07 - 18:11)

OK. And will it contact? Will it send like a text message?

Can it contact you on your mobile?

[Rachael Davis] (18:12 - 18:18)

No, it's not that good. Yeah, it doesn't. I don't think it builds in text confirmation.

It's more email based.

[Attendee 8] (18:18 - 18:18)

Yeah.

[Rachael Davis] (18:19 - 18:30)

And it might be worth doing a bit more due diligence. I don't think Trello is that much different to Asana. What would you why would you want it to send you text messages?

Is that just to remind you?

[Attendee 1] (18:31 - 18:44)

Yeah. I'm just thinking of easier ways. Martin's not very.

Martin doesn't go on the computer much. Right. And if he can have a hammer and chisel, he's a bit old school.

He doesn't really do electrical things very much.

[Rachael Davis] (18:46 - 18:55)

Then it might be worth looking around. There are other task management tools on the market. I'd need to do a little bit of extra research for you because the one I've got.

[Attendee 1] (18:56 - 18:57)

Have you used Notion before?

[Rachael Davis] (18:59 - 18:59)

Motion?

[Attendee 1] (19:00 - 19:00)

Notion.

[Rachael Davis] (19:00 - 19:09)

Notion. Yeah, I've heard of Notion. Actually, one of the chaps on PE on the board uses Notion.

Have you already got that in play?

[Attendee 1] (19:10 - 19:14)

No. Aaron and Gina are using that as we speak.

[Rachael Davis] (19:15 - 19:19)

Yeah. Does that have a task management capability in it? I thought it was calendar management.

[Attendee 1] (19:20 - 19:22)

I don't know is the honest answer.

[Rachael Davis] (19:22 - 19:44)

Yeah. So I would say find that out. Does Notion have a task management system?

Yeah. The question you want to ask just to give you a bit of an overview of what a project looks like in Asana. This is it.

So this is a simpler one that you will have. This is my checkout process. You can build a template in Asana and this could be your Glanville, Glanville house.

Yeah.

[Attendee 8] (19:44 - 19:45)

Yeah.

[Rachael Davis] (19:45 - 21:06)

In here you can see I've built out some sections. I've got the tenant notice here. Check out, tenancy end, deposit return.

And that's the whole thing. So you can see here most of this is my assistant. But some of it's me.

Yes, very little I do. But like say, for example, there were several. So you can have different people managing parts of the process.

What is great about a task management tool like Asana is that you can click on it, Mark, and see where you're up to. If I can find you an existing one, but I'm struggling to find my. Hang on, let me see if I can find an existing one.

There isn't. Yeah, it's because I'm on my smaller computer. It's.

Here we go. Hang on. Let me see if I can find one.

I'll come back to it in a second. But basically what you would see on one that's done so far is that things would be ticked off and you'd be able to see that they were ticked off. So you'd know that that piece of work had been done.

So it gives you an overview of where everybody's at. And there's clarity because part of the issue with WhatsApp is there's no clarity on what people are doing. There's just lots of people talking and it's a lot.

It's just noise, isn't it? Whereas this goes straight to it. Let me see if I can open up.

I'm trying. I'd like to find you an existing one. It's just not playing ball with me.

Bear with me a second.

[Attendee 7] (21:06 - 21:10)

Rachel, I can show an existing one with automations if you want to see how.

[Rachael Davis] (21:11 - 22:01)

Yeah, I'd love to. Adi, let's do yours after mine. That sounds like a great idea.

So let me look at this one. This is just to give you an example. So this just shows you here's an existing one for a tenant we're checking in shortly.

And you can see here that I've got all the stuff that's ticked off. You can see it's being done and it goes through the whole process and you can see everything in this. I can't scroll down, which is really annoying because of the formatting of my computer.

There you go. So you can see here all the stuff that's being done, Mark. And at the bottom of what hasn't been done.

So I know that she's up to this point. So she sent out the communication to the tenants now that this is where we're at. The next thing is the check in.

And after that is everything that comes post check in. So I can immediately see without asking Leah where she's up to.

[Attendee 1] (22:02 - 22:09)

And you see where you said send parking permit info. There's a one with a little. What's the one with the little.

[Rachael Davis] (22:10 - 22:26)

Yeah, it's a subtask. So basically on this task is the task itself. And then there's extra tasks that go with it.

So it's just telling you like this one. There's five tasks involved in this, which I can't scroll down the page, unfortunately, but there's five tasks that sit off the back of it.

[Attendee 8] (22:26 - 22:27)

Yeah.

[Rachael Davis] (22:27 - 23:24)

Sorry, I've got a formatting issue on this screen. I need to try and work out why it's not playing ball. But, yeah, that's all that means.

It's a hopefully I can show you in a second. And one example of what one of his looks like. But it's just like this.

The check in's got five tasks that go with it. And that's the subtask. And that's all it is.

And you can have one task that's got more tasks off it. Like, for example, with the issue you've got with Martin fixing a leak, he's then got to bring someone. Either he goes and fixes it or you bring a specialist in to fix it and then you complete the task.

And it's like just got the extra tasks that go associated with it on there. And that's what I would say is that probably what you need is some kind of floor workflow management tool like this that shows you. Adi, do you want to do you want to bring yours up and show us what yours looks like?

If I stop the share. Do you use the paid file tool, Adi?

[Attendee 2] (23:24 - 23:34)

Yes, mine is mine is actually. I can I can explain a little bit about what the paid version is doing a little bit.

[Attendee 9] (23:34 - 23:34)

Perfect.

[Attendee 2] (23:35 - 24:07)

And also. So there's a limitation to it. So you can get the paid version like for ten pounds a seat.

Which you start with. But if you go if your team grows to more than five people, I think after five people, you need to upgrade to the next one. Then also you've got a limitation on automations.

So you can use up to 250 automations on the on the one that's got 10 pounds per seat. And then after that, if you need more automations than that, you've got to upgrade to the next one.

[Rachael Davis] (24:07 - 24:09)

Yeah, it can get expensive, can't it, Adi?

[Attendee 2] (24:10 - 24:13)

Well, mine currently is at twenty five pounds a seat.

[Rachael Davis] (24:15 - 24:16)

Is that a month, Adi?

[Attendee 2] (24:16 - 24:31)

It's twenty five pounds a month a seat. Yeah. So I had to upgrade further because I was running out of automations and we've currently got a lot of projects.

So it's starting to get a bit. Now I can't run without it.

[Rachael Davis] (24:31 - 24:50)

No, it's really it's this is the thing, Mark. It's really, really effective for understanding where you're at on a project. And it's fantastic for project management.

And this I can see you've used the same thing. You've got sections, different people look there. Can you see, Mark?

It's got different people managing different parts of that process. Can you see?

[Attendee 2] (24:50 - 26:46)

Yeah. So what I mean is you can see that all of the tasks. This is a template.

So this is the one that's not in use at the moment. But as soon as we just copy this one on every new project and I'll show you, you can see all of the tasks are blocked. So nobody basically every team has got a dashboard.

So on the team dashboard, they only going to see the tasks that are already assigned to them with deadlines. They're not going to see all of the rest of the projects so that they can concentrate on what they need to do. So they just take one at a time in their priority.

So everybody in the team just sees that they need to do this. And also because Mark, you mentioned about the emails, you got notifications. So every day, every team member could receive a notification on their phone, say you're on this task.

This is the task that you need to do today or all of that sort of stuff. So you can get that automatically for team members. It can be done through emails, whichever is more relevant for the particular team member.

Whatever works for them better to remind them what they need to do. And the next tasks only get unblocked when, let's say, I do a client meeting send proposal. When this is completed, now you can see the system will automatically unblock the next one, assign it to Stephen and give it a deadline.

So I don't need to do that manually. And all of this will happen across like 50 different projects. It will all run automatically.

The system will assign the tasks and assign the individuals that are responsible for the task and give the deadlines. So there doesn't need to be anybody involved with that. And this is a repeatable process that just goes from every task is dependent on other tasks being completed.

[Rachael Davis] (26:46 - 27:33)

Dependencies. That's it. That's gone.

Yeah. What I mean by what I actually meant by approvals, Mark, was that it's got a dependency. So one task is dependent on another.

So the difference, what I'm describing here is the paid for service. So in the free service, you can have a list of tasks, but you manually have to take them off and you manually have to keep on top of where you're up to with it. I would manually have to chase my assistants and say, have you done X?

You haven't ticked it off yet on Asana. Whereas what Addy's paid for is to have that process automated more, but it's all on email, Mark, rather than text. That's the only difference.

The system runs it through email just to remind somebody that they've got to do this task next.

[Attendee 8] (27:33 - 27:34)

Yeah.

[Rachael Davis] (27:34 - 27:39)

And that's the difference between the paid and the dependency thing is the difference between the paid and the free.

[Attendee 1] (27:40 - 27:52)

And can you say something pops up like a water leak or something like that? You pop it in Asana. Can you make it a priority?

Is there any way of saying this needs to be done now?

[Rachael Davis] (27:53 - 28:23)

And I would say that the way you do that is you put a due date on it, as in like you need to do this today. As in urgent, you could put on it that it's urgent, but you would add it in. So the big difference with having something like Asana is that you'd have it in there and it would be clear and you could check back to see if it's being done.

And if it isn't done in the time frame you're looking at, you can chase it up. Whereas on WhatsApp, you've got no visibility on that because 10 other conversations have happened since. Does that make sense?

[Attendee 1] (28:23 - 28:30)

Yeah, definitely. And you can add extra tasks in on your mobile phone.

[Rachael Davis] (28:31 - 28:34)

You should be able to. Adi, do you use it on your phone or do you use it on your desktop?

[Attendee 2] (28:35 - 28:47)

I don't use it as much now because I've kind of given all of my tasks, I've completely given it to the team. So I don't really need to do much with Asana.

[Rachael Davis] (28:47 - 28:52)

Yeah, but before you were, were you were you using it on the desktop or were you on your laptop?

[Attendee 2] (28:53 - 28:54)

Desktop, because I just do them.

[Attendee 1] (28:55 - 29:00)

Yeah, I'm just thinking when you're out and about on the road and you suddenly see something, can you add something into it?

[Rachael Davis] (29:01 - 30:42)

Well, I think you can, Mark. Honestly, I think it's not a problem. The mobile version of it's not that bad, actually.

You can add things, you can tick things and complete them. So it is all doable on the mobile phone. Yeah.

So I think for you, that's possibly as a task management based tool, that's a place to start. I would look into Notion, but I understand Notion as a calendar management tool, not as a task management tool, because here you want to be building out projects and the project is the house or the flats and then start to finish. Just like Adi's got their stage one, stage two, stage three.

He's got onboarding the client, doing the drawings, then, you know, then going into the actual, you know, architectural design work and then actually building it out. And that, you know, that is what you want. You want a phase or a section for each stage of your journey on that particular set of flats with a number of tasks assigned.

And if one task needs subtasks, then you can add them in. You know, one thing requires multiple things to happen, like a check-in. So when someone physically goes to a check-in, five things have to happen.

Right. And so there are subtasks of that main task and that's how you build it out. But I certainly agree that you should get a chat GP to help you build out what the tasks are like.

Just give you some ideas. You'll already know what needs to go in it, but it'll just pull it all together for you. My check-in process has got 70 tasks in it and that I don't even know how many.

And then some of them have got subtasks. So it can be quite big and there can be a lot to it. But it's your specific way of doing things.

Does that help you?

[Attendee 1] (30:42 - 30:44)

No, massively. Thank you very much.

[Rachael Davis] (30:44 - 30:46)

Yeah. Yeah.

[Attendee 5] (30:46 - 31:01)

Yeah. Go on. Anyone got any questions?

Mark, when you said that the problem that came up went into a WhatsApp group and then nobody picked it up. Are you going to have the same problem then if somebody is creating a task in Asana?

[Attendee 1] (31:01 - 31:07)

No, because you're going to assign it to somebody particular. So then that person is then responsible for it, if that makes sense.

[Attendee 5] (31:08 - 31:12)

Why wouldn't they have done that in the WhatsApp message saying, John, can you get that?

[Attendee 1] (31:13 - 31:15)

Everybody else thought that the other person was doing it.

[Rachael Davis] (31:15 - 31:17)

No one was assigned to it.

[Attendee 1] (31:17 - 31:17)

Yeah.

[Rachael Davis] (31:18 - 32:08)

That for me particularly is where you need to just make sure your organisation chat and your responsibilities for each person is clear that you write something out, Mark, and that you circulate it and everybody's clear and happy with what they're supposed to be doing. Get that done first, then bring on Asana. Once you've brought on Asana, everyone's clear on what they need to be doing.

So they're not going to have an issue with being assigned certain tasks because you've already clarified with them what their roles are. It's really easy to skip the step in a business about who's supposed to be doing what. I'm going through the same thing with the new business.

We've just had a massive clangor happen. And it's because nobody's really been assigned what they need because it's brand new. Nobody's been assigned to what they're supposed to be doing.

And it's just it's really common pitfall. You know, we fall into it and we learn from it and we put something in place and move on from there. I think.

Catriona, do you want to ask something?

[Attendee 4] (32:08 - 32:26)

Yeah, it was just about that same thing about how you assign that within Asana. So presumably you have to do that work when you're setting it all up about who is going to do each individual task. And then as people change and evolve throughout the company, you'd have to change those tasks.

And as time goes on, is that correct?

[Rachael Davis] (32:27 - 35:05)

The tasks would stay the same. So every project that you do, every checkout that I do, every check in that I do stays exactly the same. It hasn't changed for four years.

Right. The same thing happens. Sometimes I tweak the odd thing.

Usually it's a template, but it stays the same. The people change. So in Asana, you invite people to work for you.

You invite them to Asana. So you would, for example, my assistant, she's called Leah. So Leah's got an email address that I created for her in my business.

I then send her an invite to Asana and then she accepts it. And then I add her to projects. So when you've got a project at the top of the screen, it basically you then add them into the project.

So who do you want? Who can see this project? It's Mark, it's Aaron and it's Martin, for example.

All three can see it and all three take part in the project. As Adi said, the beauty of an Asana project is that then people are assigned different tasks in that project. Everyone can see it, but they're not all responsible for it.

So, but they're responsible for their respective parts of it. And you can always change, say somebody leaves, you can then revoke their access and then put in the new person and then add them to the task. So on that thing that Adi showed you, there is an opportunity there to add who it's assigned to when you assign the person to it.

They've got to be invited onto Asana before you can get, you can assign them. You know, you've got to do the setup bit first, but once you've done that, you can assign the right person to the right task. And then as far as long as the main thing that Mark needs to do first is he needs to get his organisational chart done.

Everyone agreeing with what they're supposed to be doing in the business and what their responsibilities are. Everything like from bookkeeping right up to the finished product, who's doing what. Once that's agreed and that's all detailed out, I would put that in a PowerPoint, a couple of PowerPoint slides, Mark, and then just send it out to the team.

Make sure everyone's happy and agrees with it and confirms back that they agree. And then you build out an Asana tool where you've got each project is a house or a check in or a check out or whatever you want your project to be. But it works really well, Asana, where it's got start and end.

There's a start and an end to it. Where Asana doesn't work so well is where you've got a never ending project. That's like something that like your bookkeeping, it never ends.

It's harder to do when it's like constant, unless you're doing start to finish each month. But you can have multiple things on there, you know, for your business. You don't just have to task manage the refurbishment of the properties and that you can put other things on there as well.

But it works well with start and end projects. Does that help you, Kat?

[Attendee 4] (35:06 - 35:07)

Yeah, that's great. Thanks a million.

[Rachael Davis] (35:07 - 35:19)

Has anyone else got any questions on Asana or on task management tools? Anything else, Mark, you want to ask me or do you think I love it? Are you on your stepper?

[Attendee 1] (35:19 - 35:25)

Yeah, I'm getting in my steps. Went to the gym this morning and now I'm swaying side to side.

[Rachael Davis] (35:25 - 35:38)

I know, I did think that you were on a step machine. Everyone needs to learn from this. Get a treadmill or go for a walk.

I do. I do the old fashioned dog. Get out for a walk.

Cool. So do you know what you need to do now, Mark?

[Attendee 1] (35:38 - 35:40)

Yeah, no, that's really, really helpful.

[Rachael Davis] (35:40 - 35:46)

Did Liz make it onto the call or have we lost her? Yeah, I'm here. Oh, you are.

Hey, hello.

[Attendee 3] (35:46 - 35:51)

I just I was on Facebook and you couldn't hear me because I was on Facebook.

[Rachael Davis] (35:51 - 36:02)

Yeah. Sorry. Yeah.

You need to be on the Zoom to take part in the actual in the midweek mentoring. Your question was on, I like this one, making the most of championship season.

[Attendee 3] (36:02 - 36:52)

Well, it's that I said I was going to go in beast mode over the summer, but I'm feeling a bit out of kilter with the programme and the seasons because I've bought three houses in three months. I've got two refurbs going on, which is nothing like the workflow of Adi or Mark. But for me, it's quite a lot.

And at the same time, we're buying our own house and I've got my own refurb. And I'm watching the pound every day because we're buying in a different country. And so I've got a big city going on and I've got an investor that is struggling to get some money back to me.

And for a minute there, I forgot that I'd put 50 grand in wise and I had a bit of a, oh, my God. Don't have enough money to cover all these things. I had a bit of a tense moment there when I thought I was going to have to go with short notice, begging for money from places, which I'm happy to start taking on investors, but not from a place of desperation, you know.

[Rachael Davis] (36:54 - 36:56)

Did that work out? Is it all all right?

[Attendee 3] (36:56 - 37:36)

I think it's going to be all right. Yeah, I've got like three things remortgaging. I've got this guy trying to get me the money back.

I think it will be OK. But I'm wondering whether in light of this, I should just kind of switch to best self and make that the summer kind of focused on getting the family moved and established. And those sort of things and just kind of let some things remortgage and consolidate a little bit.

I still haven't replaced my corporate income. And that's the thing that's a challenge. As of these purchases are forecast forward and I have leapt my income forward.

So I'm really pleased about that. But it's not where it needs to be. And I'm worried about missing the window.

[Rachael Davis] (37:37 - 41:27)

Yeah. All right. Listen, I don't think you're going to miss the window.

I think there's well, we never know how long the window is going to last. But I do think you've already bought some purchases, which is great. So this this situation that you're in, I feel actually in the same.

I think lots of us might agree and hands up in the air. I feel you've got all of this noise, all of these things going on. And you're like, right, how do I deal with this championship season?

There's like so much. But you're already in the middle of it. So I would say you're already in beast mode, Liz.

I think there's no question that you are already like going at it a hundred miles an hour. This is what I suggest that you do. The first thing, first step is to take stock of your objectives.

So when you did your strategy presentation in January, what did you say you were going to do? Look, mine's on my desk. This is my year off.

Yeah. Here. I look at it every day.

And what was your year off? What was your headline strategy? Just go.

Just this is where I say slow down to speed up. Right. Write that down.

Slow down to speed up. Take stock of where you are. That's the first thing.

Because when you revisit your objectives list, you might be like, oh, smash them all. It's all done. Yeah.

Or you might think, oh, you know, oh, my gosh, I've only done two of them. I've really got to pull my finger out. Then you need to ask yourself, is that, you know, has anything changed?

Does it do you need to do to recognize that something might not get done because of something that's happened? Just take stock of where you are and what you need to do, because all of you set out objectives in in January, didn't you? And said that you were going to achieve X, Y, Z and B, X, Y, Z for yourself personally.

You know, where are you with that? And what's left to do? First things first, because this will help you decide what you need to do is make a summer plan.

Remember, Josh talked about the summer of 69 and making a plan. That's exactly what you need to do. Now, everybody needs to be doing this.

I'm in this. I'm right in mind as we speak. You need to know what you need to do for the summer.

The summer starts from the 1st of July. Officially, yeah. And runs till the end of September.

Yeah, that's our our P version of summer. So in this lead up to it, you need to make a plan. So once you've revisited your objectives and analyzed where you're at, you'll then be able to write a plan.

Like what do I need to achieve this summer? Yeah, like based on what I said I was going to do. Yeah.

And that will lead you into whether you need to be best self or beast mode. I think sometimes sometimes you need to take stock first before you decide what mode to go in. It sounds to me like you're already in beast mode, to be honest.

If you're doing three houses, you've purchased three houses and you've got your family home going. I'm just doing my family home remortgage and it's driving me up the wall. And you've got three other properties on the go.

That's a lot of stuff for one person. You know, Mark's got a team of people. Remember, it's not just him.

So just take stock of where you are and what you think, what you think is left to do. And that will lead you into whether that's beast mode or best self, because what you've got left, if it's a lot of work and you've got a lot of big objectives to achieve, then you're in beast mode. Right.

But if you just need you've done all of the work that you said you were going to set out to do in January and now you just need to consolidate and finish the job. Yeah, because you've literally started all of work and it's all done. It's all in the air.

It's all happening. You just need to bring it down to land. Then that's consolidation and landing and getting the stuff, finishing off what you started.

And you could you could arguably do that in both modes, but you could do it in best self mode if you wanted to, because you're just finishing what you started. So I think it's about deciding you need to go through. We all forget to go through the journey, like go back and revisit where you're at.

You know what you said you were going to do all of that stuff first and that will and then and then put a plan together. So we do this more in advance, but this is like a sneak peek. We do something called.

I can give you a sneak peek at my summer plan. I haven't finished it yet, but I've started it if you want to see it.

[Attendee 3] (41:28 - 41:28)

Yes, please.

[Rachael Davis] (41:28 - 41:29)

Yeah.

[Attendee 3] (41:29 - 41:30)

I wish you saw.

[Rachael Davis] (41:31 - 42:31)

Yeah. You name it. So you give it a name.

So my name for mine is Lean Mean Content Machine. I even got a bit overexcited about it and got ChatGP to design me a picture for it so you can do the same thing. So I'll show you that I haven't finished the rest of it because it's getting pulled together this week because I need a marketing campaign plan, which is part of building this funnel sequence out so you could do something like that.

Let me just see if I can find mine and then bring it up on the screen. And then you need to pick 10 things you need to do for the summer. Up to 10.

It doesn't have to be all. It's as many as you need it to be. But what 10 things do you need to do between July and September to achieve the results that you want?

And think about like we do the presentation in the middle of September. So when you're talking about your headline strategy for your business, remember your business year only started in April, but you should be able to say that you're on track for your targets or you're, you know, or you've done them, you know, depending on how quickly you've achieved them. You know, one of the one of the ways.

[Attendee 3] (42:31 - 42:36)

The presentation as the summing up rather than the kicking off. That's September, is it?

[Rachael Davis] (42:36 - 44:36)

Yeah. So when we do our awards day, it's on. It's in it's the middle of it's actually my birthday.

So it's on. It's in the middle of September now. We've moved it to give you a bit more time because one of the feedback we got from last year was that your summer isn't actually finished.

You know, we don't finish, you know, until the end of September. But that's fine, because all you've got to show is that you're on track to achieve whatever you set out. Because often your plan is a year long anyway.

Are you on track? Do you think you're going to achieve it? Have you done enough?

Have you put have you booked everything? Have you sorted everything? Is it all in place?

That kind of stuff is, you know, the proof of the pudding that you've you've you've done what you set out to achieve. But yeah, awards day is like 15th, I think, isn't it? Or 16th September.

And and that's just you going back over what you've achieved for the year. And it's so important for you to keep looking at what you said you were going to do and assessing whether you're getting there. You know, this is you.

And if you've like set an objective that you're not happy with or that hasn't worked out very well, that's a learning curve. Just bring it up as a lesson learned. You know, I've set objectives in the past which have been, you know, not achievable or I just couldn't do it.

Or there's been a problem with it. And everyone does. That's normal.

But it's again without looking back at what you said you were going to do, you're not going to learn the lesson from that experience. Right. So let me show you what I've done so far and how like the 10 kind of things that I've put in place.

And then I'm going to build that out. So I'm going to put a plan together that's more detailed. I'm going to say these are the 10 things I want to achieve for for my summer.

And this is the detail. Like I say, I've got to build out a marketing plan. That's part of it.

Let me just show you really quickly. I haven't started the display show with my computer, so apologies for this being a bit disorganised. I just need to change my settings.

But bear with me a sec while I try and share this info.

[Attendee 3] (44:37 - 44:52)

Could you just talk a bit as well about how the what happens kind of at the end? Does beast mode or best self mode continue until that presentation date? And then how what's the transition between beast mode and kind of next year's programme?

[Rachael Davis] (44:52 - 45:16)

Well, I would say everyone needs to go into best self mode in autumn. We encourage everyone to slow down, don't we, so that you can get some clarity on what you want to do for the year ahead. But some people can't slow down.

I honestly think that I won't be able to slow down because I'll be in the middle of a campaign season. So everyone's different and you don't have to do what everyone else is doing. Bear with me a second.

[Attendee 3] (45:16 - 45:25)

When did you when do you start doing your winter hit list and stuff? Because that kind of sprang up on me last year that when we had to start action in the winter hit list, I hadn't made the list.

[Rachael Davis] (45:26 - 46:11)

Yes. Right. So I tell you what, one thing that Pee do really well is Adam writes his winter hit list all year round.

So he put me in it yesterday. So you want a WhatsApp group that you can send to yourself to say, I need to do this next year. I need to do that next year.

And you build it up. So when you come to doing it in the winter, you've got a list already so you can do that all year round. I don't necessarily.

I often start thinking about it in autumn. Everyone can do it differently. Some people do it all year round and some people start thinking about it in autumn.

Yes. So that you can start building it up so that you know that, you know, because you're building, you know, you're building towards a winter hit list. Bear with me a second.

I'm just trying to find my quarterly planning. Right. Let's see.

So remember, this isn't completely finished yet.

[Attendee 3] (46:13 - 46:16)

So it's been beast mode our best self all the way up until the presentation.

[Rachael Davis] (46:17 - 46:49)

Yeah. Yeah. Yeah.

Basically. And then and maybe you've to finish off because everyone's got stuff they need to finish off by the end of the by the end of the quarter. So here's mine.

So I've named it. It's called Lean Mean Content Machine, which is what I think I need to do this summer. I've got an image.

That's me at the gym. Like I feel like that. And it's like it's all about my sales funnel.

Basically, this is what this is what I've got to build out for me. I'm happy with that. I like the muscles.

That's what I'm going.

[Attendee 3] (46:49 - 46:52)

Yeah. That's probably going to be an inspiration in the gym.

[Rachael Davis] (46:53 - 47:03)

It's probably going to take me another three years to get there. But, you know, that's that's where I'm headed long term. I've got a long way to go, as you can see.

But I actually do have a muscle. So I'm very pleased with that.

[Attendee 3] (47:03 - 47:05)

I've seen you doing your pull ups.

[Rachael Davis] (47:05 - 52:29)

This is basically the 10 things I'm going to do. I need to think these through a little bit more, but I need to have got some targets. So these are all based on I've looked back over where I'm at with my year off and my headline strategy.

And I'm looking back at what needs to be done. Yeah. And you're just picking 10 things that you need to do to achieve your year off.

Yeah. Your year off, your headline strategy, you know, of course, with your headline strategy, we set the plan in April and it's your first six months, isn't it? But what have you achieved in the first six months of putting your business plan into place?

And that's basically what this is. And this is me finishing off. I think I need to tweak it based on there's a few things that have happened today and it needs to change.

But by the hopefully by the end of this week, midway through next week, I should have my plan in place. And then there'll be more detail below on what that plan needs to do. But I highly recommend that you get you name it like Josh said, get yourself a picture.

And, you know, whatever that what it's just got, it's got to mean something to you, hasn't it? You know, and then, you know, I'm going to be making sure I'm in the gym three times a week doing my pull ups, all of that stuff. But alongside that, I'm going to be becoming a content machine and I'm going to be trying lots of different types of content for the new business, seeing what sticks, A B split testing, all of that stuff, trying lots of different things.

And then there's other bits in here. So, for example, these two here, these are on my objectives for my year off. I've absolutely hated doing my house.

It's been so painful, but it's something I said I was going to do and I'm doing it. It's supposed to be the nice thing. I know I'm not enjoying it at all.

It's hilarious. It's just because I'm so busy with the new business and doing other things. It's become a it's become painful, but I need to do it.

I want to do it. I'm going to get it done nonetheless. So some things will be harder than others for you.

And what you'll find naturally is that everything that you found difficult to achieve in your year off or your headline strategy, you'll have left till now. Yeah. So whatever's been difficult that you want to do, it's like June.

You're like, oh, I haven't done it yet. It's normal. It's natural.

You'll be in the same boat. But these two, I was hoping to purchase a block of flats, but I haven't I haven't done enough work on it. So I can either increase or decrease my financial fortress as in the amount, you know, if I decrease my living costs, then my financial fortress, I make more progress with it.

But either way, I'm not sure where I've got to put I've got I've got to put a plan down for each of these and how I'm going to achieve it over the summer. So what you need is the 10 things you're going to do and then what you need to do for each point to actually deliver the results. You need to break it down.

So the success comes from breaking these things down month by month, week by week. So make sure you get to the point at the end of September where you've done it all. And that's the key.

I'm happy to share this when it's when I've filled it out and done the whole thing. But I've like not I've only just started it. But, you know, by the time we go to the next workshop, my my my plan for the summer will have been built out and I'll be starting it.

So it'll start from the first of July, if that makes sense. And that's how I want. That's how I'm doing that.

And everyone needs to do the same thing. That's how we get prepared for the championship season. We just don't go into it hoping for the best.

We go into it with a plan. And that's what that summer of 69 was all about. So make sure you step back and reflect on where you're at.

Name your summer after you've reflected on what progress you've already made. Write a plan, 10 things that you're going to do over the summer, then break that down. What you're going to do each month on each one of those things to get you to where you need to be.

Yeah. And that's why all I'm going to do next is break that down. Like I'll do July, August, September.

What needs to be done in each month in order to get where I need to be. And it's just a series of things that tasks I need to do. And then in my Sunday sanity, I'll break that down even further because every month, every week, I'll have a different task that works towards each one of those objectives.

And in my Sunday sanity, I've got visibility of what those tasks are for the whole of the summer. Yeah. So I can stay on track and know where I'm at.

You know, if you're not if you're not measuring it or monitoring it, you're not going to know where you're up to. Right. So and that's how I make sure my Sunday sanity has the right things in it because I'm checking back.

What do I need to do this month? What do I need to do next month? What do I need to do for the quarter so that I know that I've got the right information in my Sunday sanity?

I'm not getting lost or distracted on other things. You can all get lost and distracted on other things. It's just about how we stay on point and on focus.

Yeah. And these are some of the disciplines that we need. That's why we talk to you about putting your phone away, removing it from the from your office while you're because once we look at WhatsApp, unless we need it for work, you just get lost in it, don't you?

Or if you go into your email, you get lost in it. You need to have, I would say, up to three prime times a day getting those tasks done that you've got. And that is how you get the progress that you need.

And that's how you do a championship season. Whether that's best self or beast mode, it doesn't matter which mode you're in. Beast mode just means you might be working evenings and weekends and, you know, going all out.

Best self means that you're working, you're doing very valuable work between nine and five or whatever you've agreed is your, you know, your your best self working times. Does that make sense?

[Attendee 3] (52:29 - 52:41)

All right. Yeah. Yeah.

I could have done with a assistant and that was on my task list, but I've been so busy with like three mortgages and moving house and stuff.

[Rachael Davis] (52:41 - 53:57)

The question I've got for you now, then, is if that's on your objectives, are you going to pull the trigger? Are you going to do it now? Are you going to get it done?

Or is that one you're going to leave? And this is a question for everyone. What you've agreed to do for the year ahead?

You know, what was in your original objectives? Are you going to pull the trigger or are you going to have an excuse for it? And don't get me wrong, we all, it's one or the other, isn't it?

We get it done or we have an excuse for it. And it's up to you how many excuses you want. And I'm not saying there's no judgment there.

I have things that I don't get done. It's just about what you really think is the most important to step change. Yeah.

So what I'm telling you here is I'm not saying Josh and Adam might be a bit harsher on you to say, you know, you need to get it done. You've said you were going to do it. However, I accept that, you know, business and life is quite fluid and things happen and you get surprises.

And there's all of this. But my question to you is then focus on the stuff that by the end of September, you're going to feel that the P was worth spending the money on, that you did get a step change. What's the step change you're looking for?

For you, it might be financial freedom, Liz, because if you want to replace your corporate income, is that the biggest step change that you can make this year? And if so, get that done. Then the assistant isn't so important.

You know, what's for me.

[Attendee 3] (53:58 - 54:01)

But one one helps to the other because I'm distracted by doing everything.

[Rachael Davis] (54:01 - 54:04)

Yeah, it does. So could you go faster with an assistant?

[Attendee 3] (54:04 - 54:07)

There is a real need to be doing the remortgages. It bores me.

[Rachael Davis] (54:08 - 55:00)

Yeah. Well, then give that to her. God, my assistant would love that.

She loves all the detail, you know, give her that. So this is the thing you pull the trigger using it. I would at this point get an agent to help you.

It's about eight or nine hundred quid. Get an agent to help you find an assistant in two weeks. You'll have one.

If you do it on Indeed, it might take you a bit longer. Yeah. But that's the other option.

You can hire someone off Indeed. You know, so pull the trigger on the things that you think are going to do the step change. You know, if there might be one thing that you haven't managed to do.

Like for me, I think this is about evaluating what your what your year of what's important to you. I've got one of mine. I do want to buy a block of flats, but it might have to go into next year because I just haven't given myself enough runway on it.

But if I launch my new business this year, that's my biggest step change that I wanted. So it's like weighing it up. Like what is more important to you?

And I can't answer that for you. Only you can. Kat, do you want to ask a question?

[Attendee 4] (55:00 - 55:42)

Yes, just related to that. I'm in the same situation as I'm doing three refinances at the moment and it is just driving me nuts. So the question really is about I don't have any staff either and I need to.

I didn't have it on my strategy thing, but I do. I'm planning on having it for next year. So the thing that's been playing on my mind over the last couple of weeks has been plodding through.

This is how long would it have taken for me to give the person access to, you know, say I had employed somebody four weeks ago and a VA. It's the whole logistics of how they access.

[Rachael Davis] (55:42 - 59:19)

What to expect. Let me let me let me give you some some some clarity on that. So when you once you hire someone, they need from you an email address.

Yeah, they need access to a task management tool because you need to be able to monitor them. So something like Asana. Those are the key things they need access.

So you need to communicate through a portal, which I would say is your OneDrive or your Google and they need an email address. I wouldn't have them using their own personnel. You want to control the information.

This goes more into security, but I won't I won't go into that now. But give them an email address. Then you've got to sort that out.

So that's one thing. Then you've got to log into and maybe set up Asana so you can at least have one to one notes with them. So what are their objectives for the week ahead?

You might not have anything else in it other than their objectives for the week ahead. So they've got you, you and them have got clarity on what they're supposed to be doing, because if you don't have that, there will be no clarity. And then you need ideally an onboarding document.

So something that says to them, this is what to expect in your first months. This is what we'll be going through. This is what I'll be teaching you.

And then they need some time with you. Right. So you're going to have to show them if it's remortgages that you're doing, you need to walk them through how you might want to hire someone with experience.

Right. That's used to doing this admin. That's a win, a tick in the box.

But from that, you might want to walk them through the like, get them to follow you on the refinance project that you're currently working on so they can learn from you. So you might want to do loom videos. So you might need to get a loom account.

You can get one for free so you can do videos and say, can you do this? And you can explain it to them in the context of a video, but you might need to create some documentation so they know what to do step by step for a refinance. You could ask ChatGP to do all of this for you.

It will save you. I mean, I've had to build everything from scratch five years ago, but now you can do all of this within within using an AI tool. So I don't think the processing of things should stand in your way to making the decision because it's too easy to do all of this.

If you ask ChatGP to write an onboarding document for you, it can write one. We've got some templates. I think some were shared in the group.

They're in the files on Facebook. There's nothing stopping you from getting this done. But at this point in the championship season, I would say that if you can hire someone quickly, hire someone with experience, but you're going to need to give them some access to your systems because that's what they need to begin with.

And you're going to need a task management tool to manage them. And then you might need to build some stuff out on ChatGP, which won't take you too long just to help you get started with them. And then you have to train them.

You've got like, Addy's had problems with this. It's the patience of training people. You've got to be able to be OK with showing them how to do things your way.

It's got to be done, but I have a meeting with mine on a Monday, a meeting with mine on a Wednesday, and then she signs off for work on a Friday. I have two Zoom calls with my VA every week without fail. I do not miss them.

Sometimes if I think I'm going to miss it, I move it to a different day. And I always speak to her twice a week on a call, face to face, explaining how things need to be done. And then she goes off and does the work.

You can't just expect them to run with it. You've got to put a bit of work into it. But once they're running with it, they're doing the work that you don't need to do anymore.

So all the pain that you're in right now, Kat, you can give to someone else. It just takes a bit of time, three months, and you might find that they're doing all of that work for you. They filled in your first, like the first time Leah did one of our HMO applications, I was like ecstatic because they're so painful.

You know, it's things like that. Yeah, you can lift all of that off and give it to someone else. But it takes time to give it to them to get the result you're looking for.

[Attendee 4] (59:19 - 59:29)

Thank you. That's brilliant. What I'm also meaning is that them accessing my documents, you know, they can do all that stuff.

[Rachael Davis] (59:30 - 1:00:46)

Yeah. So in OneDrive or in Google, you'll have some files. You give them access to those files and then they can go in and get them.

Yeah. Yeah. Do you know what?

I think this is why midweek mentoring is good because it's the detail of how things get done. And I totally understand because sometimes what gets in our way about achieving something is not the thing that we want to achieve. It's the how to get there in the first place, because we talk a lot on PE about the perfect execution, the, you know, the blueprint.

It sounds easy, but actually, when you start to put it into practice, there's all these how to questions that you don't have the answers to. And I totally understand. It's one o'clock now.

I have to get to a really important meeting because my funnel has gone sideways, if that's all right. To get to get onto this, because it's like everything's kicked off this morning. Any other questions?

Put them in the Facebook community on this particular topic and I will come back and answer each and every one of them. So if anyone's got any other comments about championship season and managing it or on Asana and using a task management tool, then just put them on the on the thread that covers the Zoom, you know, because it's it's it's I think it's live on Facebook, isn't it? And then I will answer anything else that you've got.

So if that's all right with everyone else, is that OK?

[Attendee 5] (1:00:47 - 1:00:48)

Yeah, perfect. Thank you.

[Rachael Davis] (1:00:48 - 1:01:15)

Yeah, it's been an absolute pleasure. Loved all your questions. They've been fantastic.

Adi, thank you so much for your contribution. If he's still here, I don't know whether he is. It's good to see somebody else's Asana.

But hopefully all of you found that instructive and helpful. Yeah. Thank you, Rachel.

Bye bye. See you soon. Bye bye.

Thanks, Rachel. Bye guys. Nice to see you.

Lovely to see you, Jackie. Bye. Bye.

Bye.

[Attendee 7] (1:01:17 - 1:01:17)

Bye bye.