

USING PROCESS STREET

Another really great tool that we use to help with our launches and also event planning is Process Street. Process Street is really great to help with repetitive things. For example, you have no doubt, a standard set of checks that you need to do every day, especially during launch. So as you know, there will be checklists that we include throughout the launch weeks, so you can move that into something like Process Street to create a process checklist for it, to make sure that the same things are done each time you've launched. So I'm just going to open up as we get into here. So I've got example launch checklist. So as you can see here, I'm just going to scroll down the side. So we've got, I've got it split here into welcome week, launch event week, and conversion week. And you can see here, we've got their daily actions and then the checklists split to day by day.

I really like the way this is laid out because they are literally like just checklist and you can check them off. We'll go ahead and run a checklist in a minute so you can see how it will work, but it's really easy. You can see along the side here, just split it into day by day for each of your weeks that you run. So here's your launch event week, and you can customise this. You can take the checklist that we give you as part of the "Let's Launch Together Course." And you can add in your own things or things that don't work for you, you can remove them, you can swap and change things. But the important thing is that with something like this, you can create your base checklist. And then if you find that as you're working through these things, there's something else that you're doing, you can edit and add things in, and it will update it throughout all of your templates. So to show you how this works in practise, I'm going to hit run here and you can name it. So I'm going to say, Launch Summer 2021.

I'm going to run that workflow. So what this will do, this will leave your template alone, but it will create a checklist from that. And this is the one that you will interact with and begin to work with. So let's click onto, for example, welcome week day one. So have this open at the start of your day, just open it up and look in here, will be all your tasks that need to happen for that day. And as you do a task, just tick it off. And because again, we use Process Street for this instead of monday.com, because this is better suited to sort of smaller, repetitive tasks and things that you're, if you're going to be doing these things every single time that you launch, then this is really great. It's like a one-stop shop and it's really quick to work with. We tend to use monday.com for meatier things, really.

Although you'll see it in the board on Monday I have each of the day is during welcome week launch week and conversion week. What we do actually, we'll use monday.com for everything up to kind of welcome week. And then we move out into here because this is the way that we find it easiest to work. What you can do, let's just say, you've done all of these things now and then hit complete and you'll see along the side here you get that is quite satisfying. You can see they're all checked off and it has drawn a

line through welcome week so you know you've done everything for that day. And then say, you're going through day two of welcome week. And you ended up doing something that isn't in here, but you want to add in for next time, that's really easy. You can just hit edit workflow down the side there, and then say, we're going to do this other thing because I'm not too sure what you would do, this other thing and then hit save changes. So it gives you here, so this workflow has one run in progress, which is this one, this is the active one right now. Do you want us to update it now to reflect these changes and you click yes or if you've got multiple that you're running and maybe you only want to add into this one, then you can do it one by one, but you sure do. That will add it to your template then as well. So when you run a checklist next time, that item will also be in there.

So again, it's making things manageable really and making it as easy as possible for you to make sure that everything is sort of taken care of and peace of mind as well. Knowing that if so long as you have done everything on here, you know you've done everything for your day and you've not missed anything, which is super reassuring. We used it as well for other pieces of work that we do. So I mentioned event planning, but it's also, if you've got a team and you're hiring, it's useful for recruitment, onboarding, checklists, all these kinds of processes. The platform itself has lots of different templates that you can use and they're all really customizable. You can do really fancy things in here. There's so many tutorials, videos and different ways of working that you can watch there. They're really good with support as well. And there's lots of webinars. So it's really, it's so scalable. So we probably only use it for a fraction of what it's actually capable of, but what we do use it for is really useful for us. And yeah, I would recommend that you have a look.

We will be able to include a sharing link because we can't do this from Process Street. We'll be able to drop a sharing link to this launch checklist under this video. You'll be able to click through and have a look. And if you wanted to set up a Process Street account yourselves, then you'll be able to save that into that. So I really hope this mini training has been useful for you. It's been really fun for me to talk to you guys about how we use these tools and I really hope it's been useful. And I would love to know how you get on with it. So I'm always in the community, tag me in a post, let me know how you get on. If you've got any questions or anything I can help you with, just give me a shout and I will do my best.