Tools and Tech Checklist

___ Block time in your calendar weekly to implement the Standard. Don’t delay this!

___ If you have a team member or intern who can help implement, block time for both of you

___ Listen to The Mindset it Takes to Succeed with Jordan Gill of Systems saved me to get in the right mindset

___ Schedule a recurring weekly time to have a ‘Topline Meeting’ with yourself or your team. Write down the various categories and topics to be discussed at a high level. For example, Admin, HR, PR, Potential Clients and Full-Service Clients

___ If you have a team, schedule a weekly touch base with the head of each department for status updates and to keep projects moving

___ Check out the dry-erase calendars we use. These are a nice (organized) addition to any office!

___ Visit the Google Calendar website and see if going digital makes sense for you and your business

___ Set up your Asana account and familiarize yourself with the application until you are comfortable with it

___ Set up your Google Drive and create folders for your current clients as well as different aspects of your business such as Admin, Accounting, HR, Marketing, etc.

___ Make sure you have a design software that works for YOU. Do not use Word or Excel to keep track of everything. If you do not have a design software, start asking fellow designers what they use and like for their firm

___ Save all of your new logins in your design software. If the software does not have a dedicated space for usernames and logins, add this information in a notes field

___ Create your Wecora account and use the **full-service template attachment** we gave you in Lesson 7 to create your own template

___ Create your Design Files account and practice making one board for a client