COACHYU

LEVEL 1 VIRTUAL ASSISTANT GUIDE

Dennis Yu
Host of the CoachYu Show

Table Of Contents

Introduction

You will be learning constantly as you move forward through the CoachYu program. Do your research: Be proactive and do research before asking questions. Suggest the solution you think is correct when you ask your questions whenever possible.

Search with Google, specifically if you are looking for information that is not specifically a BlitzMetrics practice or process, (e.g. how to link a specific time in a Youtube video, how to use a WordPress plugin, etc.).

Ask your team lead via email or Skype. If you are new to the system, be sure to send out an email with your Skype username to get connected to the rest of the team. Our senior team members have a huge email load, so refer questions to your team lead whenever possible. You can locate your team lead in the Team Roster.

Key Assets

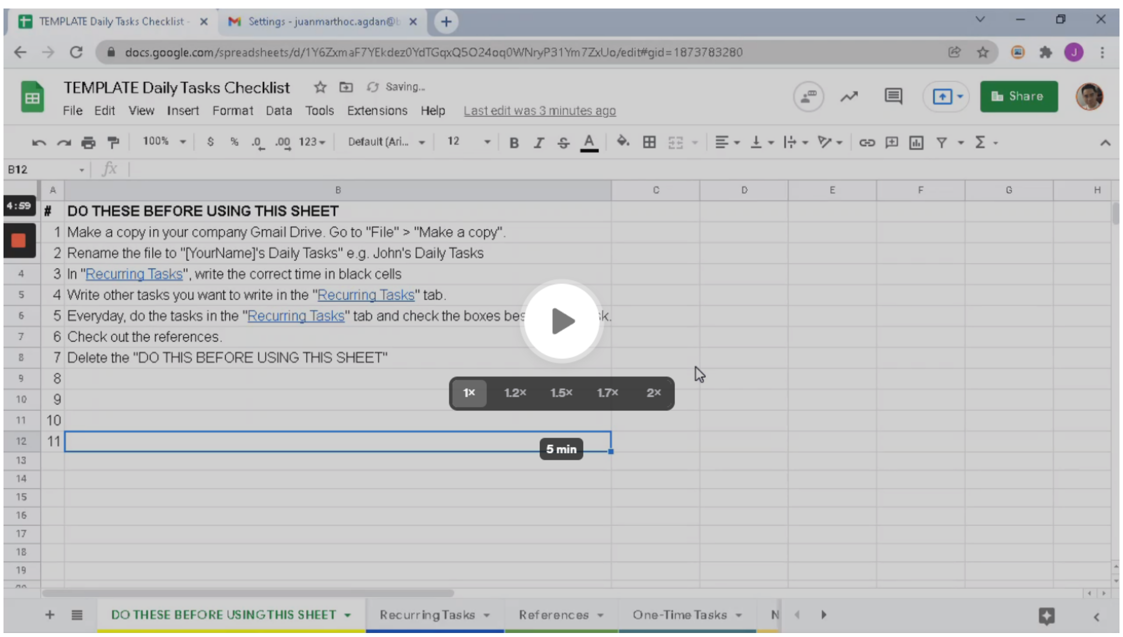
Only internal team members of CoachYu will have access to these documents. If you are not an internal team member, and you need access, you are very unlikely to gain access.

Make sure to have access and bookmark these assets and the assets that follow:

- Client Tracker.
- Operations Process Guide.

How To Use The Daily Tasks Checklist

TEMPLATE Daily Tasks Checklist



Video Guide: How To Use The Daily Tasks Checklist (4:33)

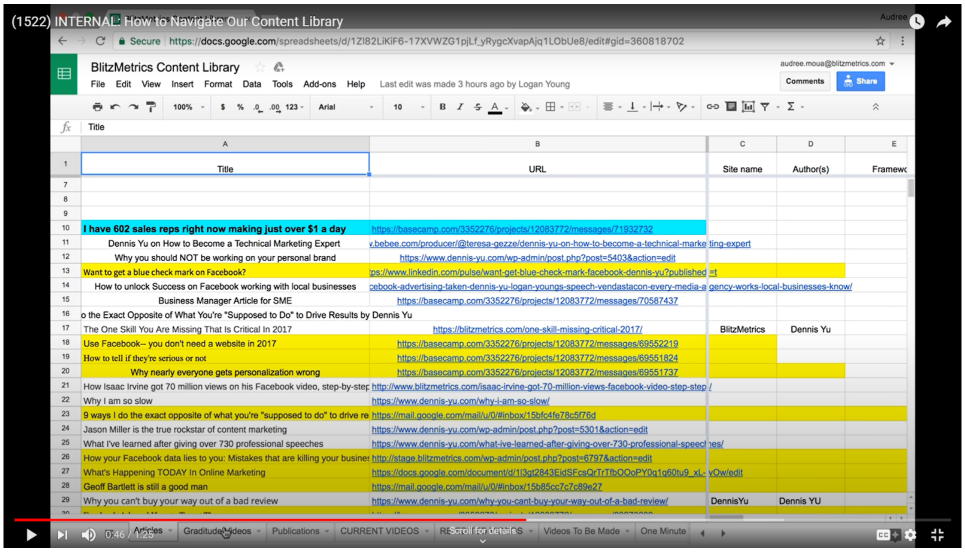
Asset Tracker

There is a huge amount of information in our current courses, programs and guides, which you'll find in the Asset Tracker tab: Important Docs.

Courses and Programs are composed of many components such as the guide, videos, presentation version, and so forth. Team members often mistakenly believe that the PDF guide is the course itself.

BlitzMetrics Content Library

There are countless articles that BlitzMetrics has written on a wide variety of marketing topics, which you'll find in our [Content Library](#).

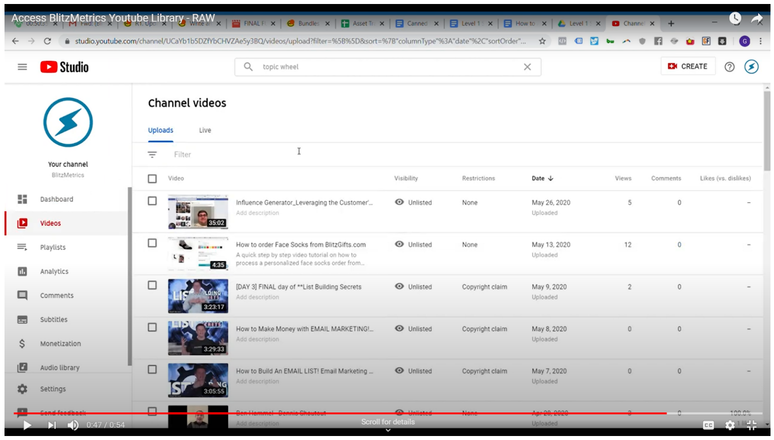


Team Roster

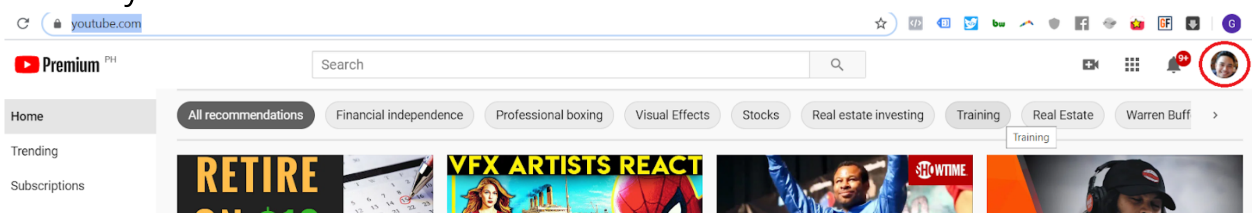
Ideally, nobody on the team will ever have to ask anyone for their Skype, email, phone number, time zone, birthday, and so forth, since we keep this information updated in our Team Roster.

Take a moment to make sure your information is up-to-date, and bookmark the document for future uses. Add a row to insert your picture and contact information.

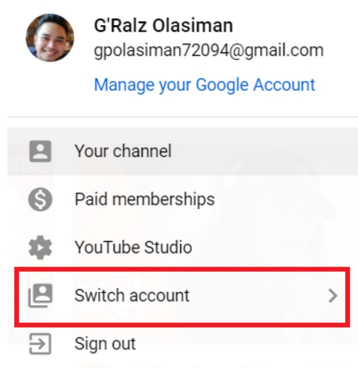
How To Access BlitzMetrics YouTube Library



1. Log in to [YouTube](https://www.youtube.com) with a BlitzMetrics email address.
2. Click on your avatar icon.

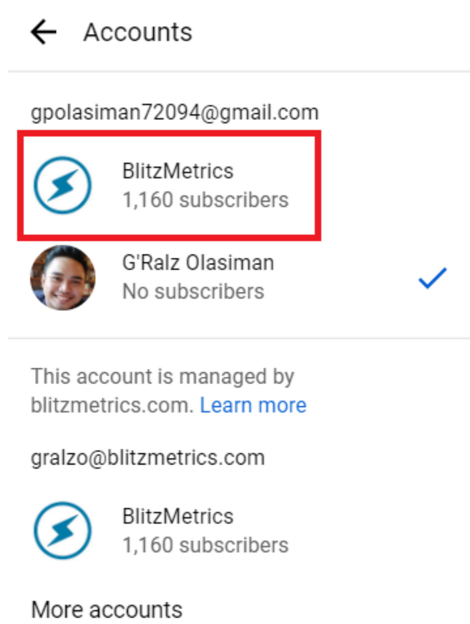


3. Click "Switch Account".

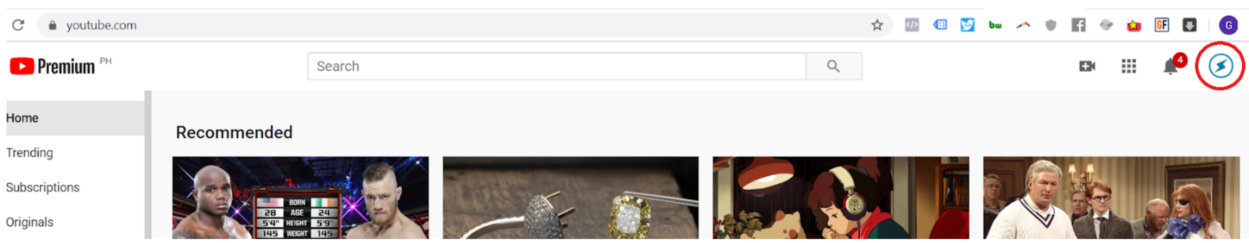


4. Click "BlitzMetrics".

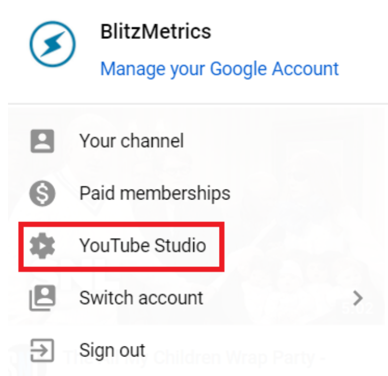
   Once you've chosen BlitzMetrics, you'll now be able to access the full BlitzMetrics video library.



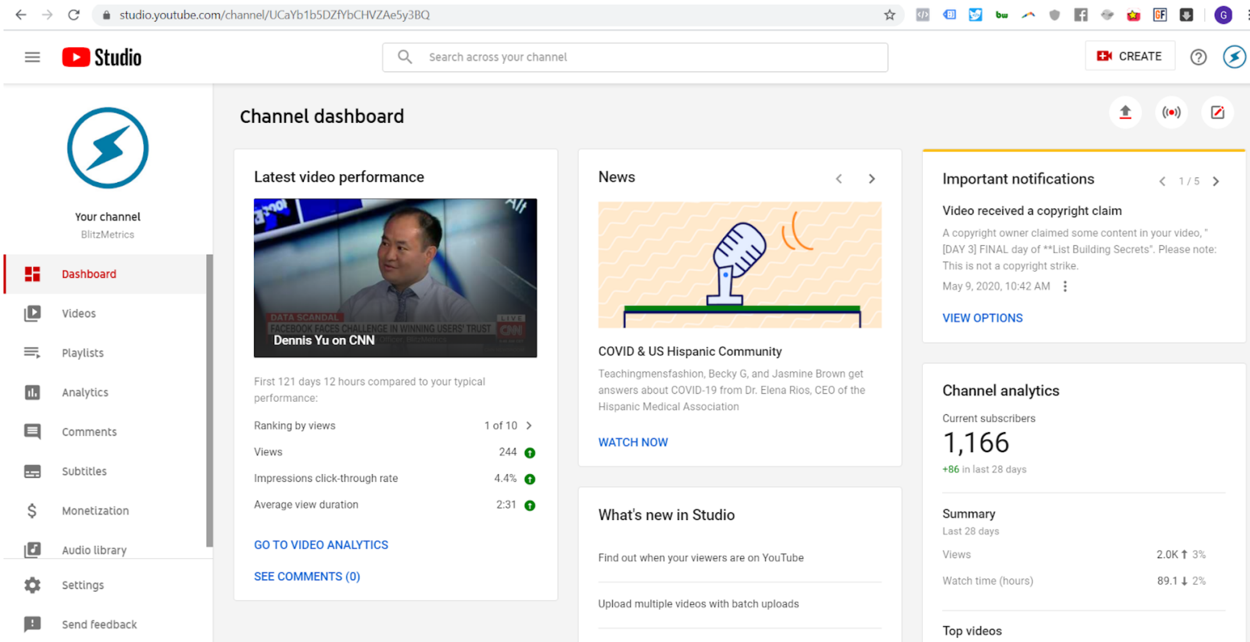
5. Click the BlitzMetrics Icon.



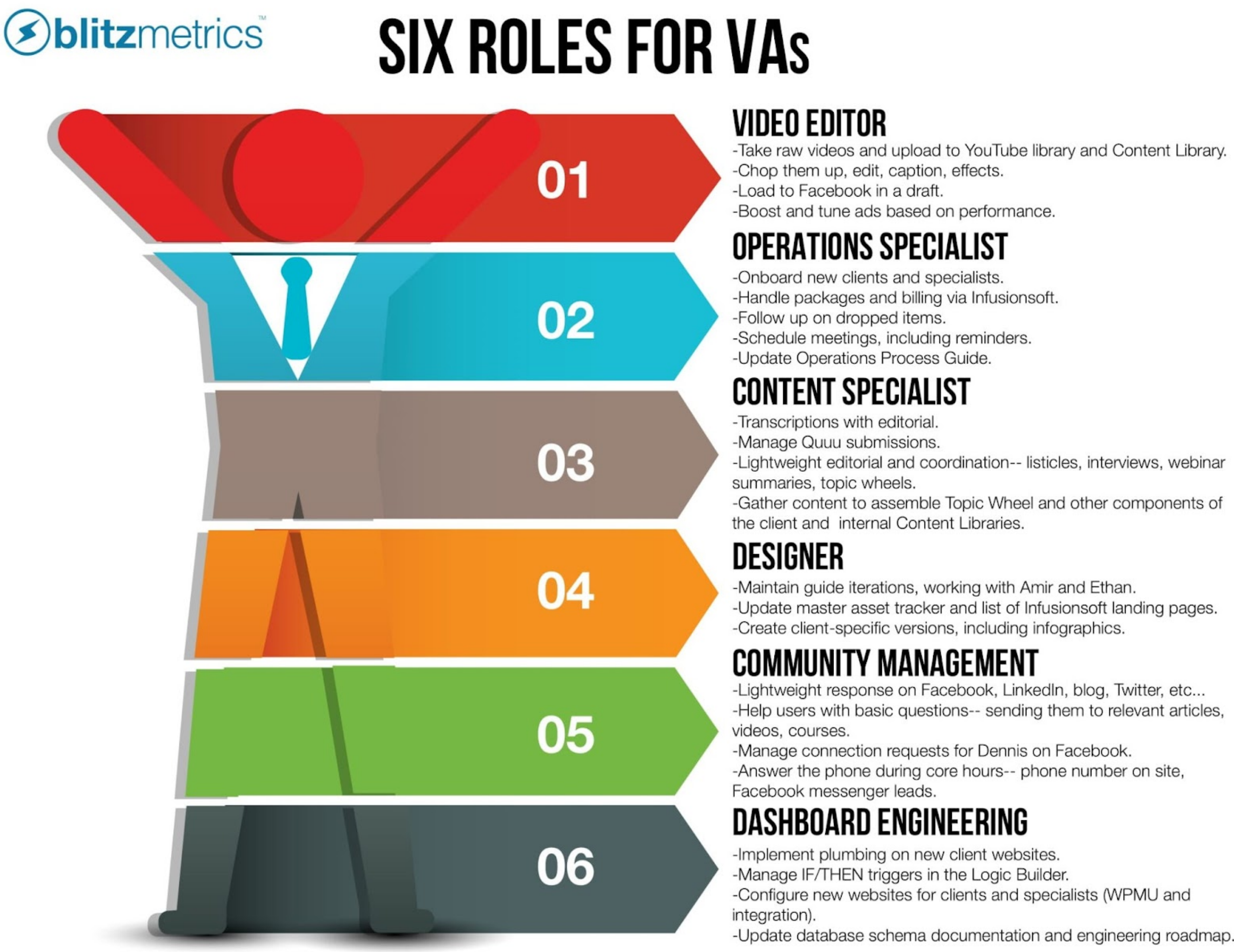
6. Click “Youtube Studio”.



You’ll be redirected to the [BlitzMetrics Youtube Dashboard](#).


studio.youtube.com/channel/UCaYb1b5DZfYbCHVZAe5y3BQ
Studio
Search across your channel
CREATE
Channel dashboard
Your channel
BlitzMetrics
Dashboard
Videos
Playlists
Analytics
Comments
Subtitles
Monetization
Audio library
Settings
Send feedback
Latest video performance
Dennis Yu on CNN
First 121 days 12 hours compared to your typical performance:
Ranking by views 1 of 10
Views 244
Impressions click-through rate 4.4%
Average view duration 2:31
GO TO VIDEO ANALYTICS
SEE COMMENTS (0)
News
COVID & US Hispanic Community
Teachingmensfashion, Becky G, and Jasmine Brown get answers about COVID-19 from Dr. Elena Rios, CEO of the Hispanic Medical Association
WATCH NOW
What's new in Studio
Find out when your viewers are on YouTube
Upload multiple videos with batch uploads
Important notifications
1 / 5
Video received a copyright claim
A copyright owner claimed some content in your video, "[DAY 3] FINAL day of **List Building Secrets". Please note: This is not a copyright strike.
May 9, 2020, 10:42 AM
VIEW OPTIONS
Channel analytics
Current subscribers
1,166
+86 in last 28 days
Summary
Last 28 days
Views 2.0K 3%
Watch time (hours) 89.1 2%
Top videos

Six Roles for VAs



How To Achieve Individual Effectiveness And Team Effectiveness

How to achieve individual effectiveness and team effectiveness. Eisenhower Matrix, ducks

Being an effective project manager by troubleshooting from the Client Tracker

Communication

If you're new to digital marketing, it's quite confusing–so much to learn. Along with that you will encounter new things and digest new material constantly. You should actively learn for our existing training and checklists. However, not 100% of what you need to know is covered in the videos or the articles. We intentionally do not teach every single aspect of every single task, since we don't want to duplicate the entire body of knowledge of digital marketing–just the critical pieces most unique to what we do. While there will always be an unlimited number of topics to study and go into deeper, we also have to see how practically you can get work done–as is typically in most fast-growing companies.

Communication Is Key And To Win We Must Address All Concerns

It's the lifeblood of our success and the pulse for clients. There is never the "taking away" of a lightweight touch... By not delivering our message we hurt their progress and ours.

In general, when you receive an email and you need to reply, if the topic is the same, simply reply to the same email thread.

Start OF Day Reports

1. Verify that the start time of your schedule is accurate in the Team Roster.
2. On the start of your shift, send a Skype message to live:access_268 that says "I am starting my shift".

End Of Day Reports

Creating End of Day Reports is one of your responsibilities as a team member. Do what you must in order to make sure that you do not miss posting from Monday to Friday. You must start creating End of Day Reports from your starting date and beyond. You can set an alarm at the end of the day, create a daily to-do list, or post a memo near your desk to make sure you always keep them in mind. We post these messages on Basecamp.

Answer the following questions with your top 5 most significant tasks in the "daily-updates" chatbox once per day at the end of your workday. Top 5 means the most important items. So if you're listing 5 random things, instead of the top ones-- we don't understand the value.

1. What I did.
2. What I have to do.
3. What you need from others (Optional)

Make sure to give specifics in your answers to help the team differentiate from your answers in previous days. For example, maybe you uploaded 15 more episodes of a series of videos or let in 3 customers.

This is to ensure that the End of Day Report will be a meaningful exercise instead of pasting in the same functional line items each day-- not useful to you or the team.

What you should not write in an EOD report

1. Managing your emails.
2. Inbox Zero.
3. Answering EOD report
4. Answering SOD report.
5. Most recurring tasks.

Examples

Juan Martho Agdan, Process Development Manager

(1) What are the top 5 things you did today?

1. Level 1 Specialist Course Google Document Version.
2. P1. Update the Level 1 VA Course
3. Create QUICK GUIDE for FDD course (Continuation)
4. LVL4_Course Creation_SEO 101 MINI-Course
5. Daily: Fill in the Start of Day (SOD) sheet

(2)What are the top 5 things you'll do on your next shift

1. Watch https://academy.blitzmetrics.com/courses/office-hours-how-to-create-documents-at-scale/, THEN reply to "Fwd: (BlitzMetrics Design: Design - Depository) Skin up templates we can use for our stuff (Covers images for webinars, events, promos, and inter..."
2. Vendasta Agency Management Presentation (continuation-1)
3. High P: Add a "Buy This Course for $7" button in all office hours MICRO Courses//delegate this
4. Figure out if adding an order form at 0.00 will work for free courses.
5. High P: Add a buy this course button for all courses except for the MICRO Courses.

Anderson Lou Depositario, VA- Video Editor 1
December 8

What I did
- Re: P1 Edit: Our focus has been on the creation (SAE)_ - Special Projects: Dennis Yu
- P1 Edit: The best way to learn is to learn how to learn - Special Projects: Dennis Yu for Jan Koch
- P1 Edit: A lot of you are not doing video - Special Projects: Dennis Yu for Jan Koch
- Update VEQS
- Self Study about landing pages and how to edit pages.

What I need to do
- Re: Video Edit | 7. [STORY]_Migraines and Nose Bleeds - Clients 5 - Content Machine: Dr. Vivek Soham
- Re: Video Edit | 4. [STORY]_Who Looks After The Moms - Clients 5 - Content Machine: Dr. Vivek Soham
- Re: Build 3 landing pages_ - BlitzMetrics Operations: Internal Functions
- Wait for Social Media Access to cross post the videos

HO **Hezekiah Orteza,** Technical Specialist
Eod for Dec 10 and 13

What I did:

1. Iterate on BC Task P0 Edit: How to become a professional public speaker- Tips they don't tell you
2. Iterate on BC Task High P: Create a web page for blitzmetrics.com/video
3. Gave admin access to support@businesstechninjas.com in our blitzmetrics.com site
4. Review and iterate on the BC thread: blitzmetrics.com/partner

What I'm going to do:
1. Task Prioritization
2. Email Management
3. Re-watch training: How I Get Through 1,000 Emails Per Day (outside working hours)

Teresa Miren Aprecio
12/8 and 9
-Managed Emails (Ops/Stephanie)
 - granted access to courses
 - cancelled subscriptions/welcomed new members
 -answered queries
-VA hours update

What I need to do
- manage emails (Ops/Stephanie)
- invoice rev share partners
- socks
-caption snippets
-catch up on backlogged tasks

The Basics of Good Communication

Good communication is vital to being an effective team member. To keep it simple, we've broken down good communication into 5 steps:

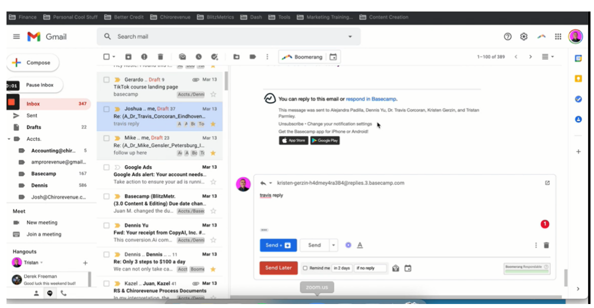
1. Stay on top of email.

Our goal is to be at inbox zero at the end of the day so that we can be productive instead of reactive. By being at Inbox Zero it allows you to be more proactive, instead of reactive. There should be no more than 3 days having gone by without communicating with a client or teammate. Here is some Inbox Zero training from Dennis.

Pro tip— always personalize your responses to show you're not a robot and that you care. We personalize ALL responses, client-facing, and internal.
We can have bots send our canned responses so that humans don't do this mindless work.

How I Get Through 1,000 Emails PER Day Without Any Fancy Automation or Tools

How to Double Down On Your Inbox Zero Using Tasks As Your Ammo, Making Inbox EASY!



How to Double Down On Your Inbox Zero

2. Stay in touch with your team lead, updating regularly on your #GSD (Getting Stuff Done) which has three categories: Done, Doing, Dependencies

Personal Efficiency - Do, Delegate, Delete

All teammates must have Boomerang and Grammarly installed on their Chrome.

Note that 3 or more boomerangs on a thread is a fireable offense.
Keep in mind that your team lead is also very busy. Contact your team lead after researching solutions, thinking for yourself (MAA) and suggest the solution you think is correct.

Check "My Assignments" through Basecamp to see tasks assigned to you. Make sure to place email content in Basecamp for easy reference.

For more on this point, reference Dennis' explanation here: Don't Make Me Chase You

Note well: **Never** message Dennis with an issue before messaging your team lead.

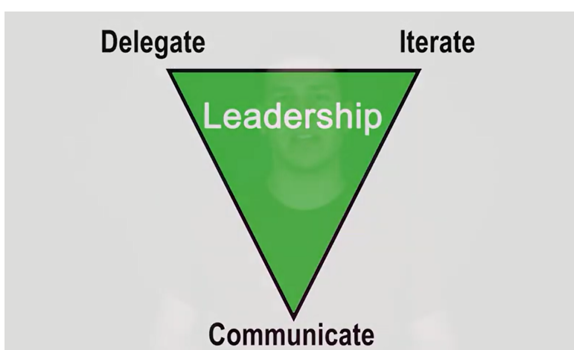
Request to Dennis should only be Level 6+. Most likely, none of the tasks you'll be working on as a Level 1 Specialist will fall into this category.

Bookmark the Team Roster now for questions on team structure.

3. Practice #LDT: Learn, Do, and Teach.

This process is a fundamental aspect of communication at BlitzMetrics.

As you Learn and Do, practice Teaching by communicating your knowledge in the internal training, guides, and courses.



Leadership - Communication, Iteration, Delegation

4. Actively network.

This means connecting and communicating with your team members and project participants through Facebook, LinkedIn, and Twitter to build your personal brand.

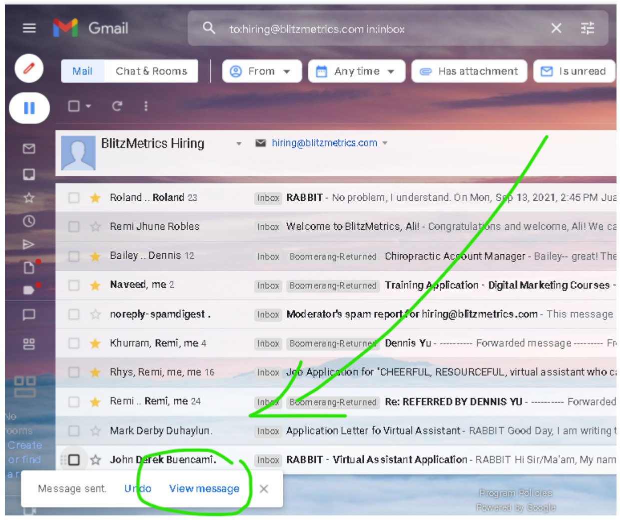
5. Practice #CID: Communicate, Iterate, Delegate

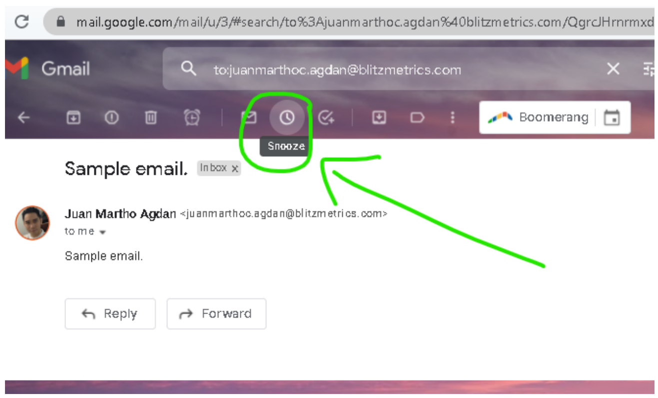
[#DDD and #CID for individual and team effectiveness]

- With Communicate– we need to make sure that we have reliable communication, even if it's just acknowledgement, which is not the same as working on that video.
- With Iterate– we are working on the task, making steady progress against it with daily updates, as required in our Operations Process Guide– not delaying communicating to only when done.
- With Delegate– we ask for help (good) or end up needing to be rescued by someone who notices there is no communication or iteration (not good).
- On every message that you send, make sure you add the relevant links.
- Be very specific ahead of time.
    - So your team members can be very clear about the objective. Otherwise, we'll waste 3-4 emails.

        "Sure what do you need?"
        "Oh just this and this."
        "Cool I'll look"
        4 days go by.
        "Any luck?"
    - It happens over and over. Instead, send exactly what you need and support links/information to get it wrapped up!

6. Set a "Snooze" or "Boomerang" to at most 7 days from when you sent the email if you are waiting for a response, dependency or deliverable. Reach out through synchronous communication channels such as Skype, Discord or phone if you have followed up for the 2nd time. Your teammates' contact information must be in the Team Roster.





7. Keep private information private.

Verify that the list of recipients under “to” and “cc” of the email are permitted to receive that information.

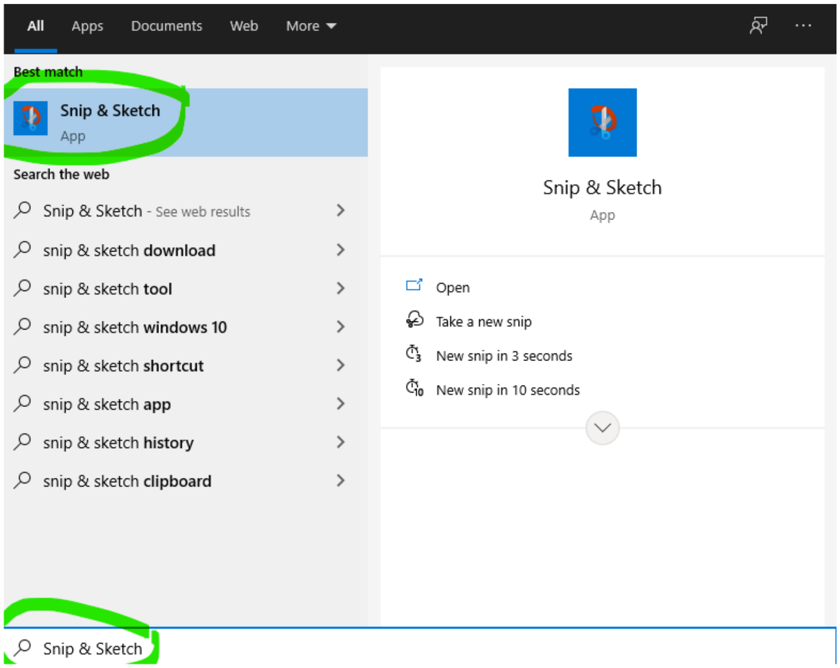
Whenever you are taking screenshots, especially those that have passwords and sensitive information in them, attach the screenshot instead of using another tool outside of our recommended list. Make sure that you do not upload the screenshot to an external website or server.

Use the default screenshot software in your computer in order to take screenshots.

For Windows, use “**Snip & Sketch**” and set the “PrtSC” button in your keyboard to open “**Snip & Sketch**”. Whenever you use “**Snip & Sketch**”, you can use the tools to draw, and then save the image either by using “**Save as**”, “**Copy**”, or “**Share**”.

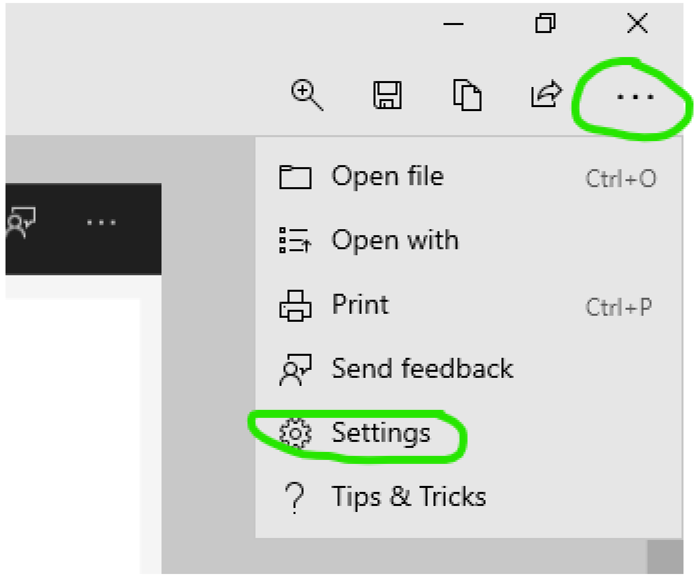
How To Set “Snip & Sketch” As The Default Screenshot Application of a Windows PC

1. Open “**Snip & Sketch**”.

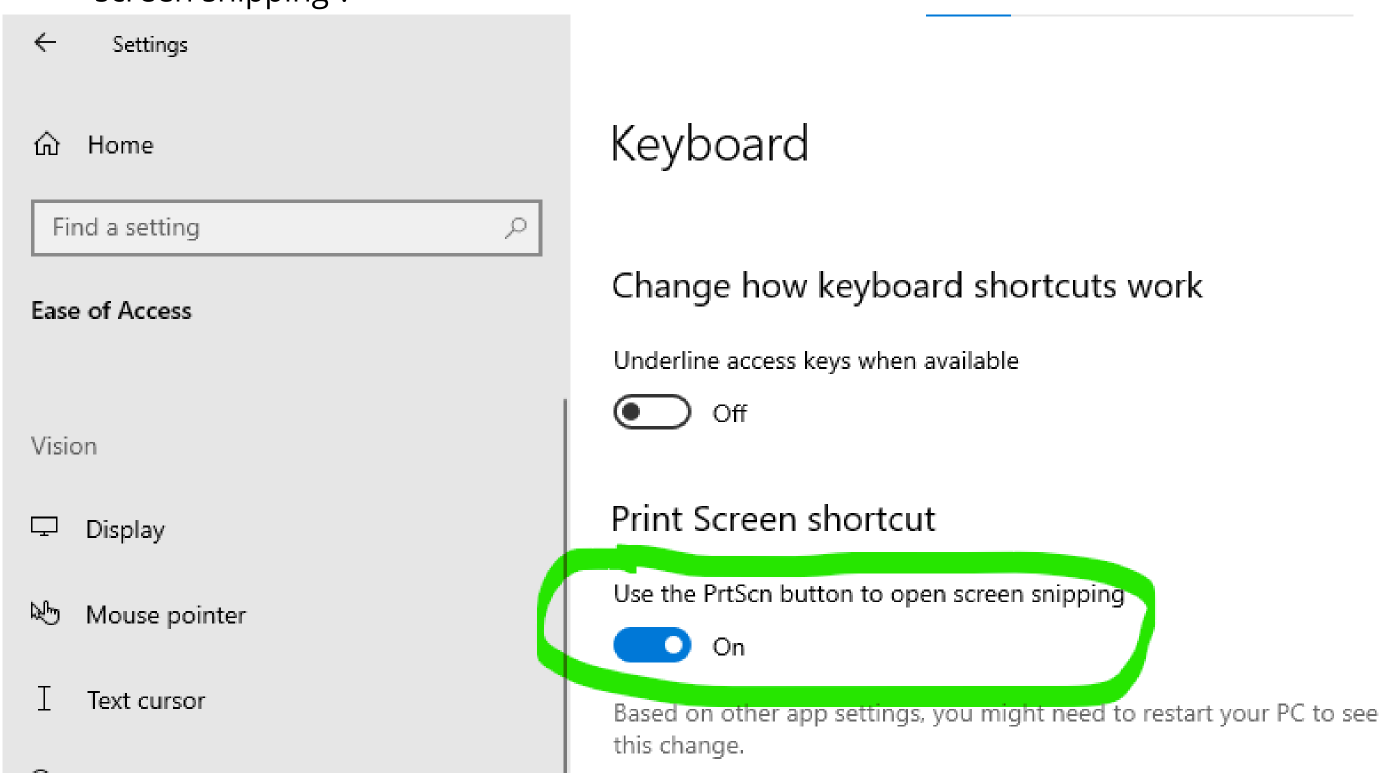


   a. Hold the Win Key + S.
   b. Type “**Snip & Sketch**”.
   c. Click “**Snip & Sketch**”.

2. In the "**Snip & Sketch**" application, Go to "Settings".



   a. Click the ellipsis button.
   b. Click the "Settings" button.
3. Click "Use the PrtScn button to open screen snipping".
4. In the Keyboard Window that pops up, turn on "use the PrtScn button to open screen snipping".



Synchronous vs. Asynchronous Communication

Communication can be broken down into two categories: synchronous (skype message, phone call, fb messenger, text message, etc.) and asynchronous (email, Basecamp, etc.)

There are proper applications for both synchronous/asynchronous communication. **As a rule, unless there is an emergency, use asynchronous communication since you don't need a reply faster than an email reply.**

Kolby Smith Synchronous vs Asynchronous Video:
https://www.youtube.com/watch?v=qkN3zQzMSIk

Dennis explains why:

"The most common two phrases I hear from clients and team-mates seem to be:
"Hey, quick question: ...", and "Let's hop on a quick call..." The squeaky wheel gets the grease, right? Sometimes this is the right idea. But sometimes the squeaky wheel is the wrong wheel.

Obviously, some questions are appropriate and deserve attention, but these two requests are a Trojan horse sitting outside the gate of your productivity castle- unassuming, but harboring the potential to be wildly destructive to your process.

They can do more than hinder your productivity though. Their effect on personal efficiency can cripple your efforts to scale. One problematic person takes 10X the effort of managing one competent, productive person.

You're a coach, not a babysitter. If your people aren't on top of their work, you'll dig yourself into an insurmountable hole if you try to do it for them.

Maybe a castle is the wrong analogy: Picture your productivity as 737, sipping fuel after burning hard to reach cruising altitude. One "quick question" and 4 hours of coaching later, you're back on the runway." - Dennis Yu

In general, call or use other channels if email is not working, such as Skype, Facebook, SMS, mobile, etc. Refrain from giving up after sending a couple emails with no response. There are exceptions.

RACI (Responsible, Accountable, Consulted, Informed)

Before you proceed visit this page to have some context about the RACI model: https://blitzmetrics.com/4-secret-words-how-to-communicate-well/

Since our team works together on many projects it is very important to establish clear responsibility for each task or deliverable.

To denote the roles of the various participants in a project, we use the RACI model.

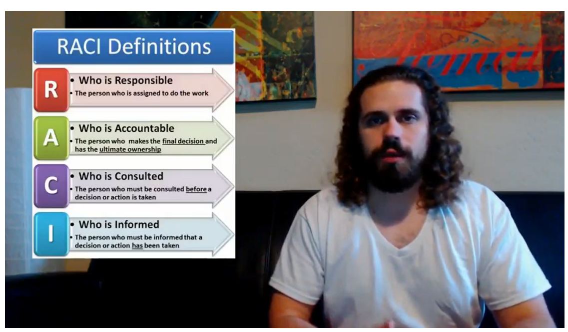
What is RACI?

RACI describes the participation by various roles in completing a task or creating a deliverable for a project.

R – Responsible: Those who do the actual work to achieve the task.
A – Accountable: : The person who makes the final decision and has ultimate ownership
C – Consulted: The person's expert opinion may be sought.
I – Informed: The person who must be informed that a decision or action has been taken

Whenever you initiate communication, make sure that you consider the RACI roles for the task in question in order to communicate effectively.

Here's our team mate Paul Sokol providing an in-depth look at the RACI model



[RACI W/ Paul Sokul]

With RACI, R is for task-level work, which means whoever is accountable (A in RACI) loads up SMART (see acronym) tasks into Basecamp, organized into to-do lists.
Dennis is usually C, but if not, then I– so he's one of the two.
Anyone who is R, A, or C is by definition "I" generally in the project, but not necessarily I for every single thread.
A brief intro into project management, which is RACI:

https://dennis-yu.com/2011/11/07/help-how-to-succeed-as-a-first-time-project-manager/

By default, everyone should make sure that they subscribe or copy the account manager or project lead to every To-do thread for a particular client project and the To-Do threads in the Basecamp Projects.

How To Subscribe To Dennis Yu's Google Calendar

How to subscribe to Dennis Yu's Google calendar for anyone with an active BlitzMetrics email account.

You can subscribe to Dennis' Google calendar by completing these steps without assistance from the Ops team:

1. Go to your Google Calendar app, https://calendar.google.com/
2. Click on the gear icon at top right corner
3. Click **Settings**
4. Click the dropdown **Add calendar**
5. Click **Subscribe to calendar**
6. In the search box type in dennis@blitzmetrics.com and 668sierra@gmail.com
7. Click back, and you should see the events on Dennis' calendar.

Email Account

Never request for file access using your personal or business email account because this request is broadcasted to everyone in the company and ends up creating an unnecessary burden to everyone.

The right thing to do is to wait for your BlitzMetrics email account to be created. This automatically grants you access to all the documents that are privileged only to BlitzMetrics employees and you don't need to request any access.

Access

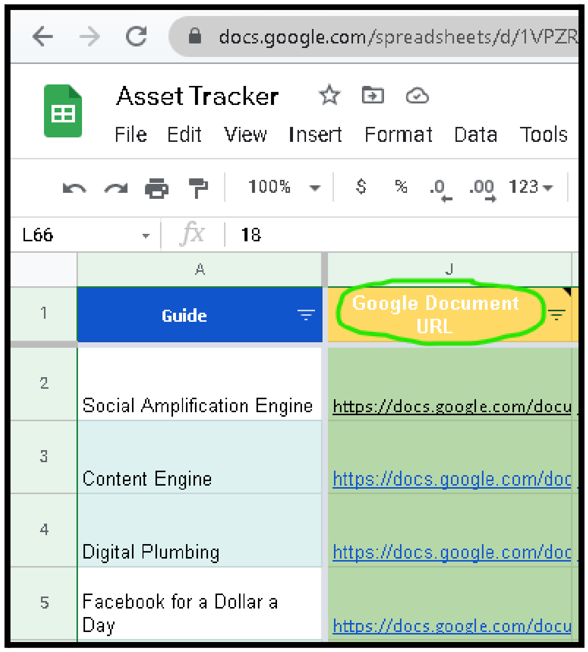
Obtaining access should never be a next day thing. Get it quick from people in charge. Skype if need be since everyone should be working during the day, you shouldn't have to wait hours or days for this. The Team Roster has more contact information if you ever need it.

Go to the "Access" section of the Operations Tracker to identify who to obtain access from. If you cannot find it in the list, inquire about it to a person who fits the role or escalate to your team lead.

Master Guides

We define the phrase "Master Guide" in 2 senses:

1."The" **Master Guide**—The guide that is the collection of all guides, plus business-level strategy and other higher level topics.



2. Master Guide or the Google Document version of a Course — "standard" guide on a specific type of discipline in Digital Marketing or module as we define in the 18 Module Architecture.

—These are the guides that appear in the **Asset Tracker**'s Guide Doc Tab.

—Master Guides usually follow the form of:

"Master {Process} Guide"

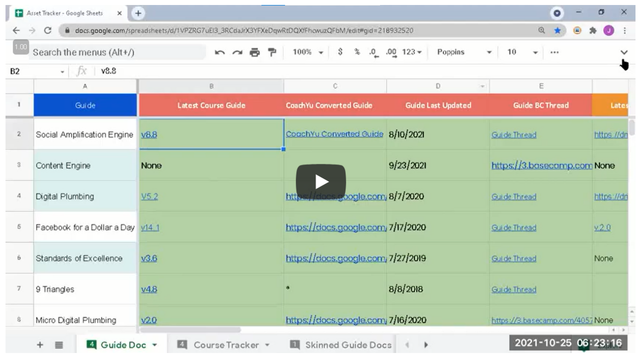
For example:

"***Master Operations Process Guide***"

"***Master Content Marketing Guide***"

All Master Guides are what we use in order to generate the PDF versions of our courses.

How To Find Where To Recommend Or To Suggest Changes To Any Guide Or Course



How To Modify A Master Guide

For all modifications to Master Guides, make sure to post the updates in their Basecamp Threads, which you can find in the **Asset Tracker**. Always keep someone who is level 4 or above subscribed in the Basecamp thread. If your level is 3 or below, never use **Editing Mode**, instead use **Suggesting Mode** when you need to make a modification.

Identifying and Eliminating Passive Voice

Read it here: https://blitzmetrics.com/identifying-and-eliminating-passive-voice/

The other day, I sent an email to a colleague that I thought made complete sense. It simply said “The document has been uploaded” in response to a question. In this situation, I even had to ask where the passive voice was.

That is a passive voice, since you’re left asking “Who uploaded the document?”- I should have said “I uploaded the document.”

The definition of a passive voice is when you promote an action as the subject that creates an indirect action that may or may not be clear to the recipient. An example is “I wrote this article”, which is active. “This article was written by me.” is passive, and pointlessly bloated.

NOTE: Rule of thumb is to always put you (the subject) ahead of the action**.** Only use Passive voice when concealing the identity of the subject and to describe past events.

I realized how ambiguous my email was after I read it. Being clear, direct, and concise are skills that will carry you in the professional world. Striving to make sure your writing is as clear to the reader and writer is critical. Just because it makes sense to you does not mean everyone else will interpret it the same way.

But how do you recognize this? When people speak in a passive voice, they are removing the “doer”. Usually, this is subconscious, but the mode is the same– it’s harder for us to figure out what is going on and who is taking action. The result of passive voice is no action.

Passive voice is also something We are working on every single day. Similar to how a number/metric must always have a noun, “20” versus “20 apples”, all tasks and actions must also have a clear owner. “I moved this” versus “This was moved”. “Dennis and I are recording” vs “Recording is happening.”

It is a little tough to catch it all the time, but In a business setting, we must eliminate all usage of passive voice– especially when doing project coordination, or speaking with a client. Every action must have a clear owner that comes first, and every project needs someone responsible for completing a task- adhering to the RACI (Responsible, Accountable, Consulted, Informed) model.

Thinking in passive voice is to drastically eliminate your effectiveness and accountability- It’s not something innocuous, such as the your and you’re grammar problem or the “ums” in most people's speech; it detaches all ownership of actions, making it hard to trace who did what, which propagates confusion.

Here's a few real-world examples we've picked from emails, with corrections:

"Call has already been booked." vs. "I booked the call, it's Thursday at 10."

Who booked the call? I booked the call.

"This email is to confirm that this account is at inbox zero." vs. "This is Bob confirming that this account is at inbox zero."

Who sent this email? Bob sent the email.

"More updates to come as these get closed out." vs. "I will provide more updates as these get closed out."

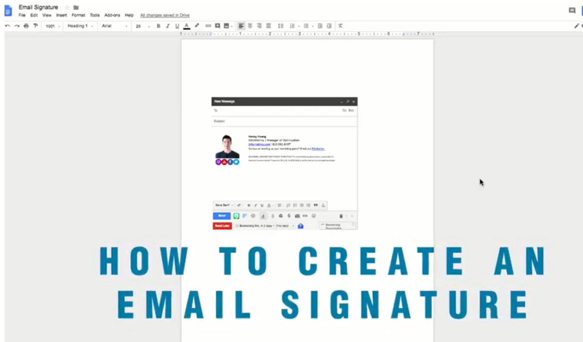
Who should we expect updates from? I will send them.

"This thread was moved here" vs. "I moved the thread here."

Who moved the thread? I did.

This is less about being picky concerning grammatical rules and more about being action-oriented. Passive voice often comes from a mindset of unaccountability, where it's someone else's fault and where we don't step up as owners of our actions. Do you now see how using direct language ensures everyone is on the same page?

Creating an Email Signature



[How To Create An Email Signature]

How To Log In To Gmail Or Google Workspace Using Access@blitzmetrics.com

The Google Workspace or Gmail account that is associated with **access@blitzmetrics.com** allows you to log in to many of BlitzMetrics' accounts such as Google Ads, Google Photos, Google Drive and many more.

Qualifying Checklist

The list of items you need before you log in to Gmail or Google workspace using **access@blitzmetrics.com**.

- ❑ Password for **access@blitzmetrics.com**'s Gmail or Google Workspace.
- ❑ Backup Code OR Verification Code to **access@blitzmetrics.com**.

Note: Email **operations@blitzmetrics.com** to get the password and the backup code.

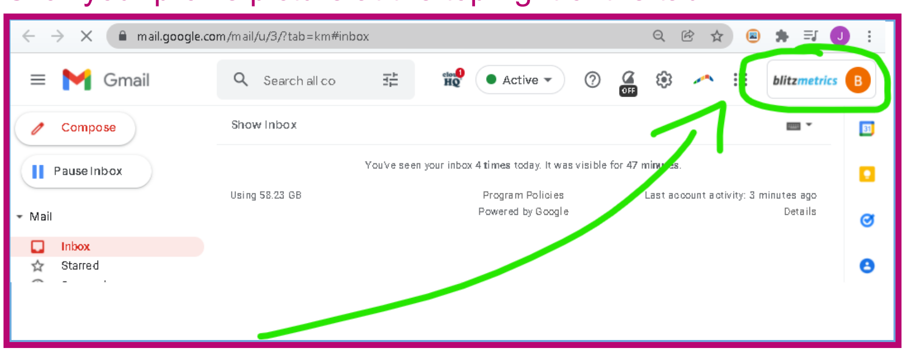
Execution Checklist

The list of instructions to log in to Gmail or Google workspace using **access@blitzmetrics.com**.

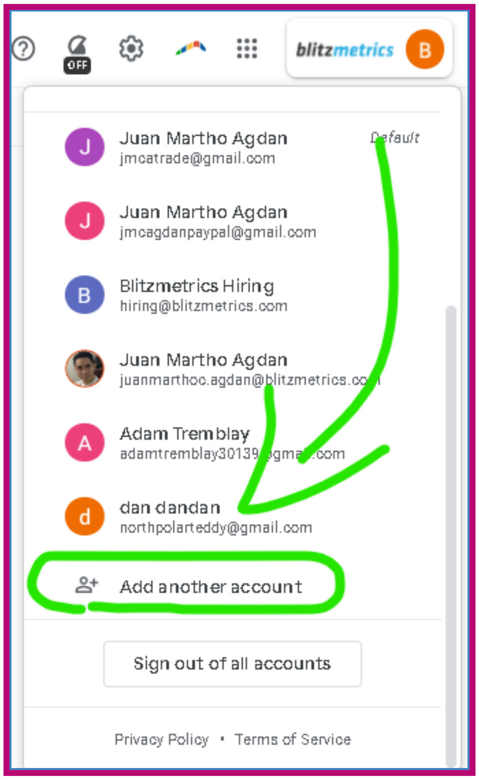
1. Go to **gmail.com**.
2. Login using **access@blitzmetrics.com** as the username or email address.

If you are signed into a different Gmail account, THEN

a. Click your profile picture at the top right of the tab.



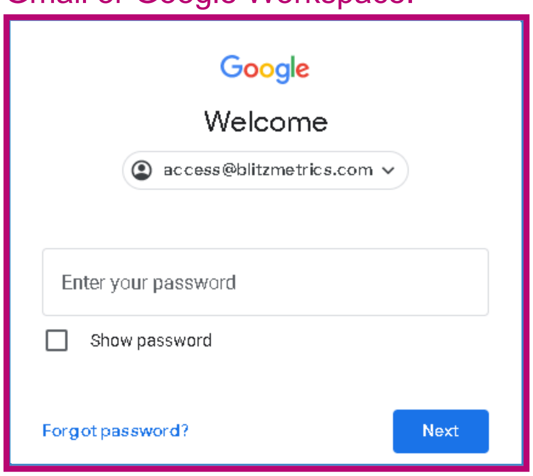
b. Click **Add another account**.



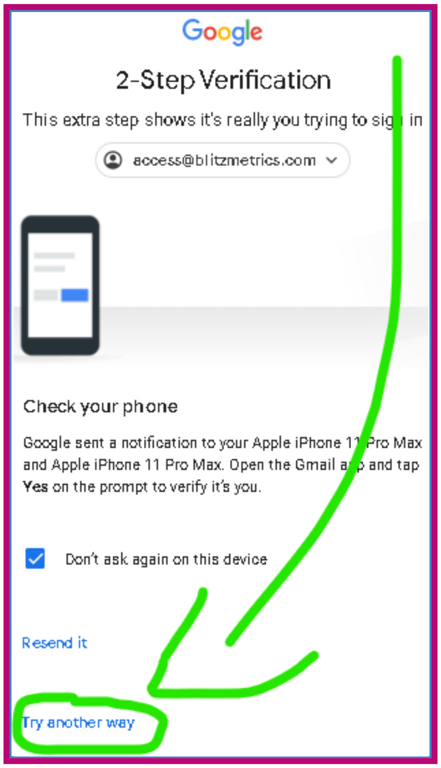
c. Under **Email or phone**, write **access@blitzmetrics.com**.

d. Click **Next**.

3. In the blank box for the password, enter the password for **access@blitzmetrics.com**'s Gmail or Google Workspace.

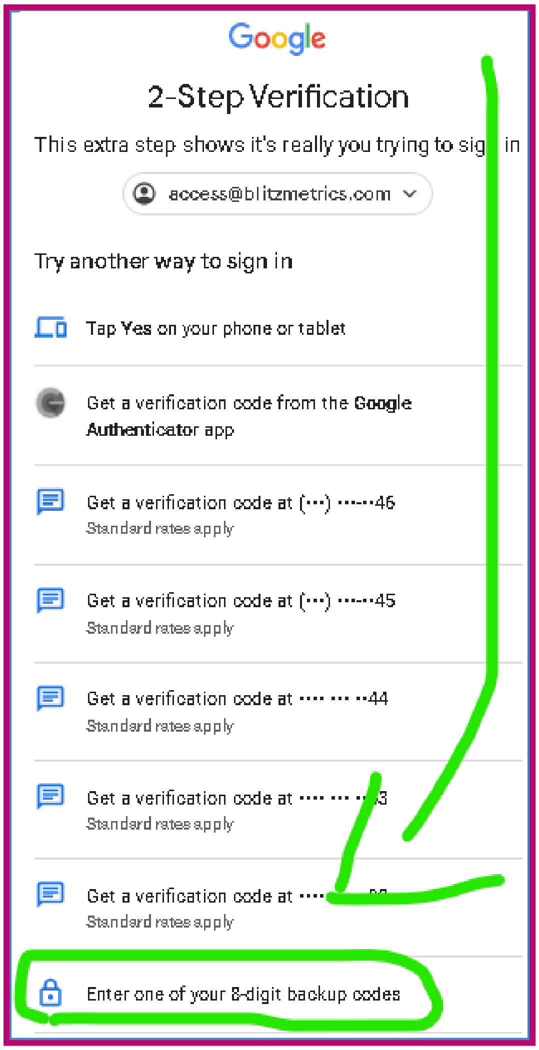


4. Click **Next**.
5. Click **Try Another Way**.

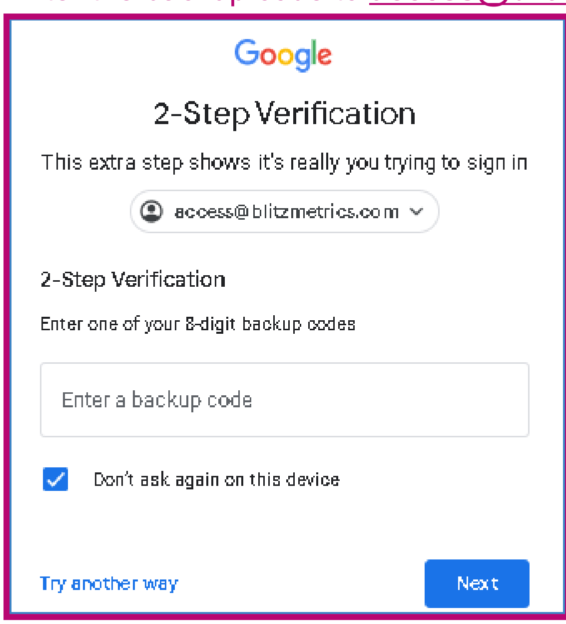


6. Click **Enter one of your 8-digit backup codes**.

    A backup code is single-use which means it will work only once per login. If you need another backup code, email operations@blitzmetrics.com.



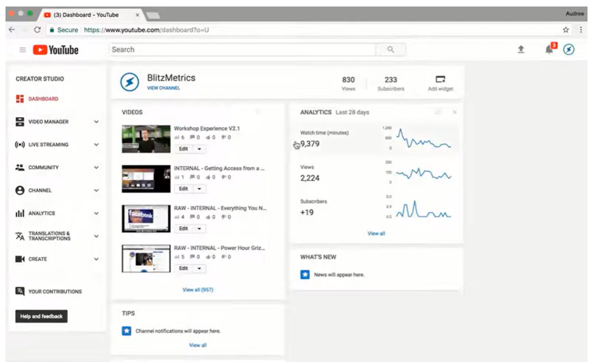
7. Enter the backup code to **access@blitzmetrics.com**.



8. Click Next.

Navigating Our YouTube Channel

One important resource all specialists should use is our [YouTube channel](). Not only does it have all of our videos on there but a lot of answers as well. Make sure you are looking at our YouTube channel anytime you feel stuck because we may have a video already located there to help you out. Also, down below is a video to help you navigate our YouTube channel as well as where to find our video manager.



[How to Find Videos in BlitzMetrics YouTube Channel]()

YouTube Channel: Key Points

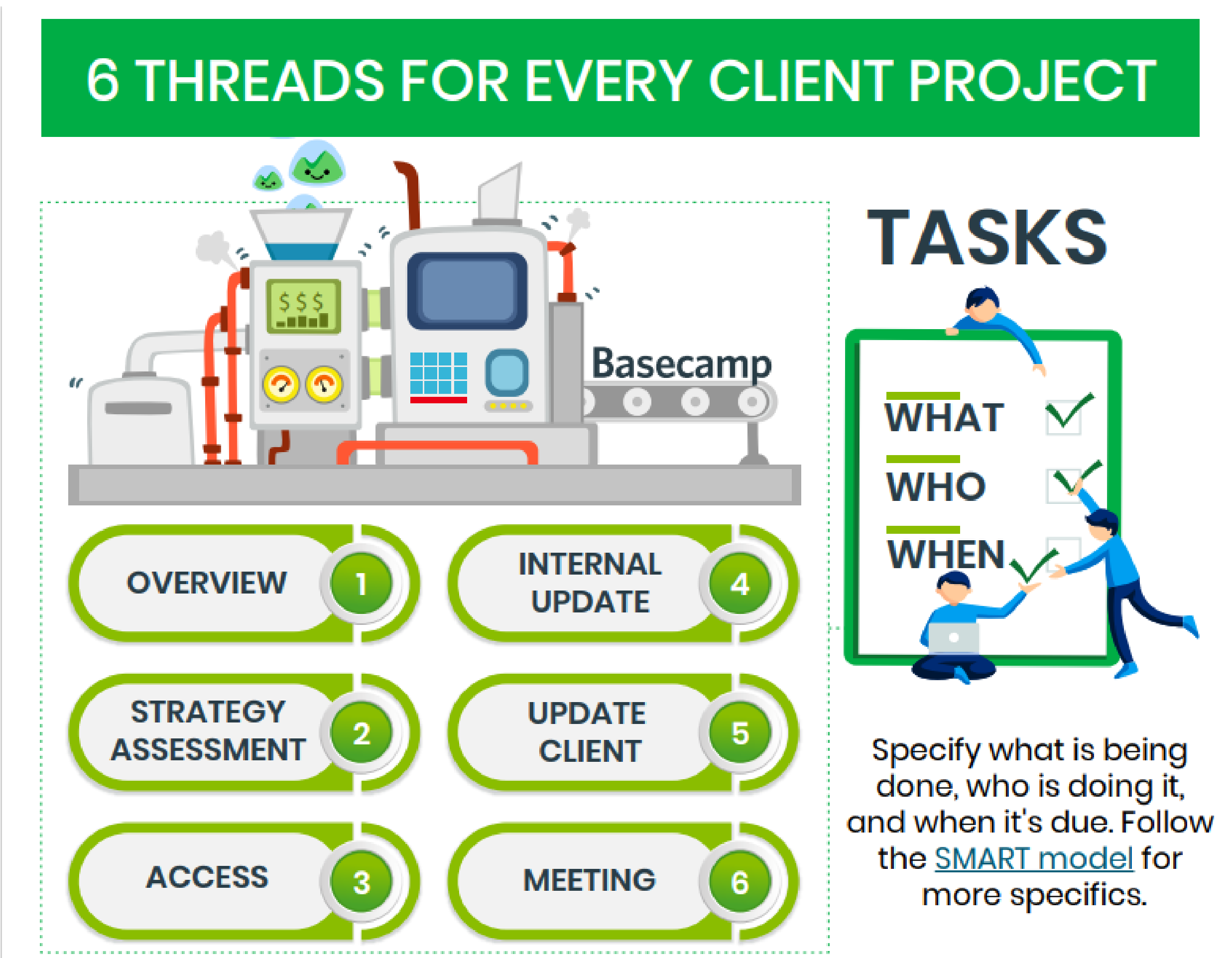
- Video manager is where you can search the videos up
- You can make edits to videos while you are in the video manager
- Look at our YouTube channel if you feel stuck for we already may have a video discussing how to get past it

Basecamp Basics

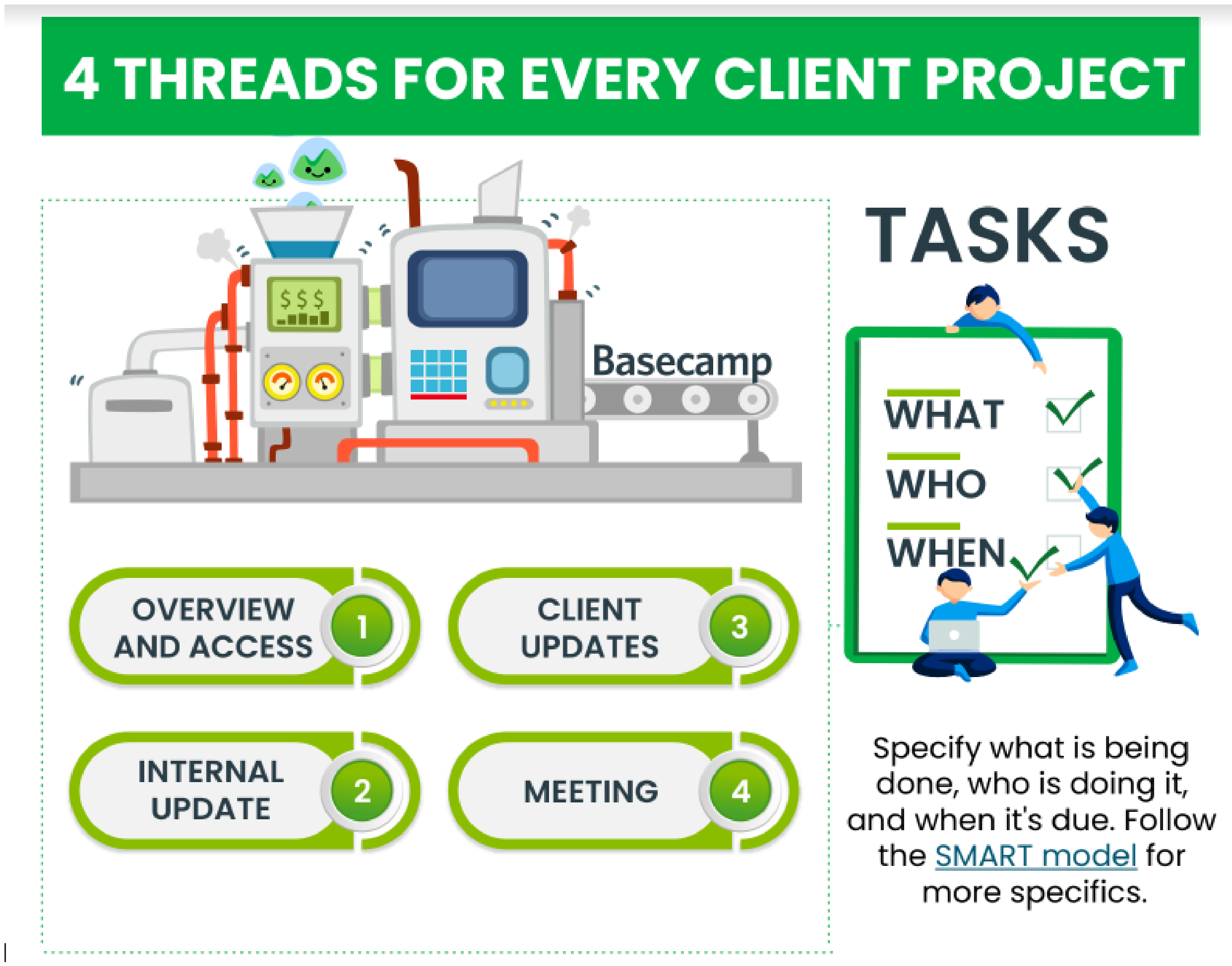
Basecamp is the main place we communicate with our team (your team is all the people working with you on your client project) and with clients.You must stay on top of what is going on in your team's Basecamp projects for each of your clients.

For everyone, we'll take the approach: *If it didn't happen in Basecamp, it didn't happen.*

As a team, you should post regular updates, practice Do> Delegate> Delete, Learn> Do> Teach, and Communicate> Iterate> Delegate to keep up with your clients.



For Chiropractor clients:

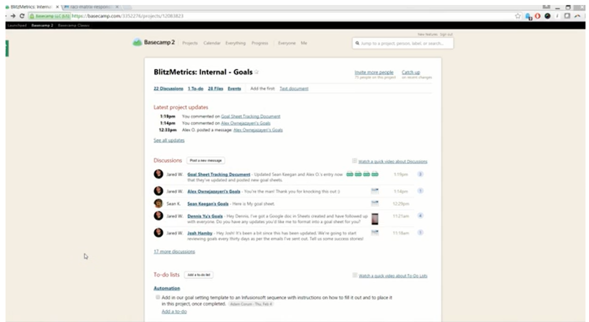


Observe naming conventions when posting on Basecamp projects. Names of the threads created should relate to what your task is (e.g. Fb marketing and boosting post).Keep in mind that clients will see what you post on client threads unless it is specifically an “internal” thread discussion which only the people working on the project may see and access. Always consider who should also receive a notification.

When sharing presentations, “decks” or guides with clients, always use PDF format. We only use document formats (.pptx, .docx, etc.) when we share internally.

When sharing documents internally, share through our BlitzMetrics Google Drive, which has unlimited storage. Basecamp charges per GB of storage used, so when you post documents directly to Basecamp we are losing money. Please post documents as a google drive link.

This video is ABSOLUTELY CRITICAL. Pay particular attention to who will receive email updates anytime you post in Basecamp. By default, Basecamp will message everyone at the company when you start a new thread. Never will you intend to send a message to the entire company, so please check the boxes next to the appropriate recipients only:



[(311) Notification Settings in Basecamp 2]

Additional notes:

Please never post files to basecamp directly. If you do, then there is no context and nobody can reply, so we cannot iterate. If the file you are posting doesn't belong in an existing thread, then start a new message and include the file as an attachment.

Test your skills:

For a bit of practice, create a goals thread for yourself within Basecamp.

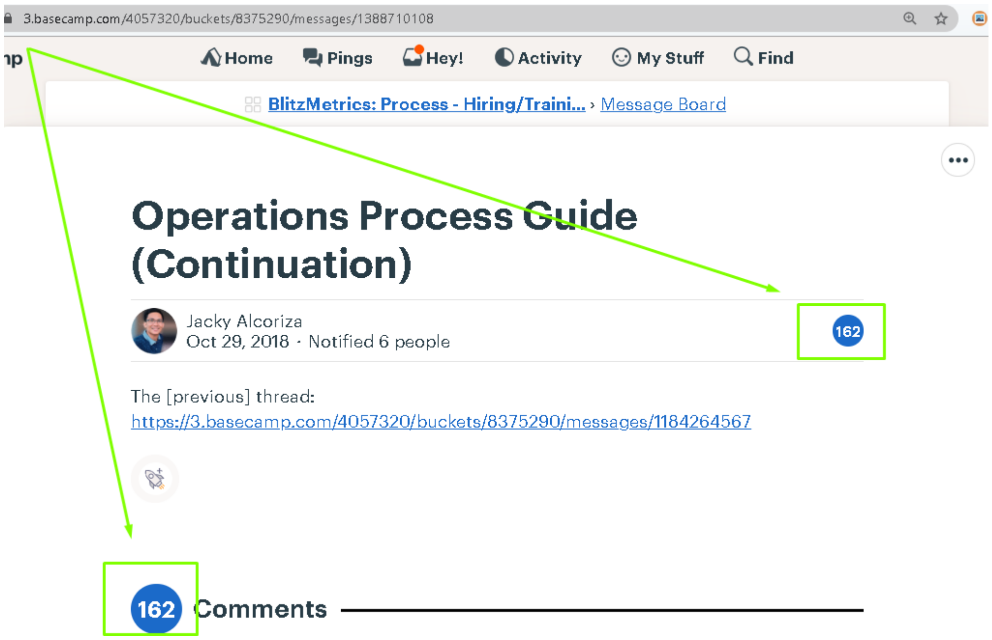
- Create a new thread within BlitzMetrics: Internal – Goals
- Title your goals according to the naming convention you see others using.
- Use the Goal Setting template to set your goals.
- Also, post your now completed Specialist Qualification One Pager that you got when you started.
- Upload your files and compose your post. Don't forget the crucial step: Select only the appropriate recipients! Tag your team lead, and the CEO of Blitzmetrics.

How To Maximize The Use Of "Find" In Basecamp

1. Click "Find" at the top bar in BaseCamp. Wherever you are in BaseCamp you will find this "Find" button.
2. Click on the dropdown "by anyone" and change it to a user in BaseCamp to filter the results.
3. You may want to use the other dropdown buttons to further narrow down your search result.
4. In the search bar, type in the keyword(s) you wish to use to find what you are looking for.

How To Create A Continuation Thread in Basecamp

We create continuation threads in Basecamp once the amount of comments in the thread has reached 80 because Gmail truncates email messages in email threads whose number of email messages reaches 100. At the point where there are 80 posts in a Basecamp thread, team member's inboxes have at least 100 email messages.

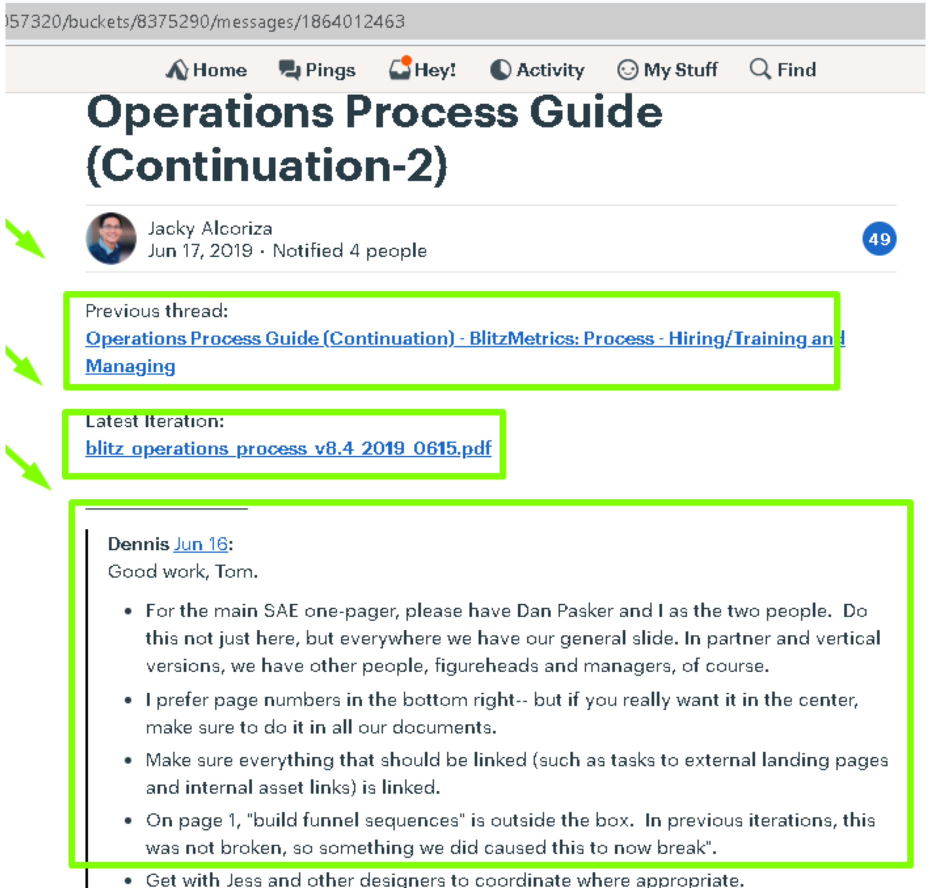


1. Check the amount of messages in the thread by checking the number beside "Comments" at the top of the thread. If there are at least 80, proceed to step 2.
2. Read the most recent 5-10 messages in the previous thread to identify crucial dependencies, discussions and URLs.
3. In the same Basecamp project, create a new Message Thread with the same title as the previous thread while adding "(Continuation-{N})" at the end, where N is the number of continuations above 1. E.g.
   a. "Client Updates (Continuation)" for the first continuation thread.
   b. "Client Updates (Continuation-2)" for the second continuation thread.
   c. "Client Updates (Continuation-3)" for the third continuation thread.
4. Fill in the variables below and add this canned note to the continuation thread:
   "Previous Thread: {Link to previous thread}

   Links: {URLs}

   {Quote of crucial discussion}"

   Sample screenshot of a continuation thread:

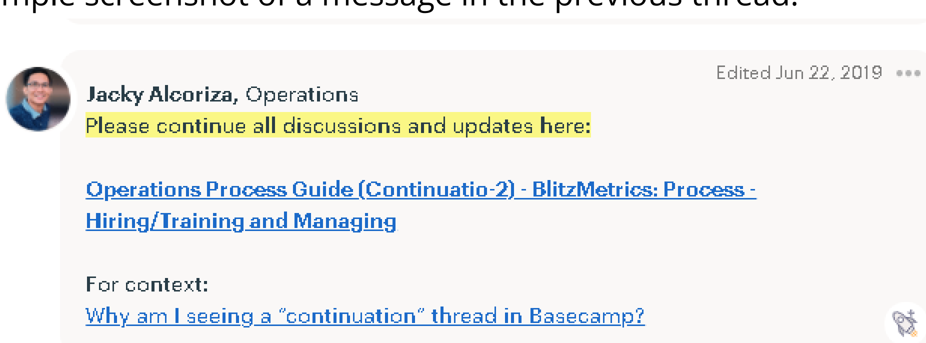


5. Before posting the continuation thread, check who the recipients are and follow RACI by removing users who should not be subscribed to the thread.
6. Fill in the variables below and add this canned note to the previous thread:
   “Please continue all discussions and updates here:
   {Link to continuation thread}

   For context: Why am I seeing a “continuation” thread in Basecamp?”

From this point forward, all users continue discussions in the continuation thread and should cease discussions in the previous thread.

Sample screenshot of a message in the previous thread:

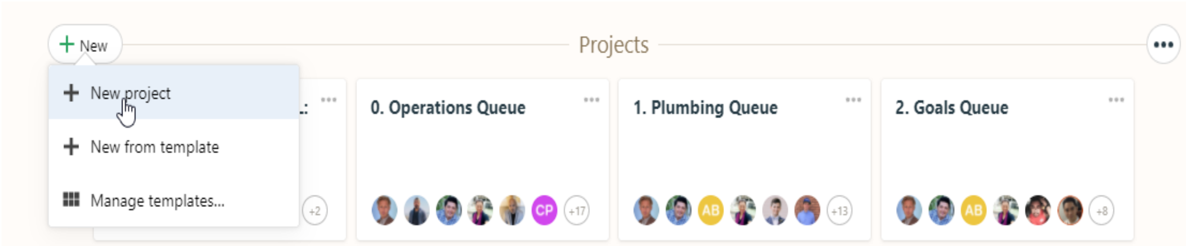


How To Merge 2 Duplicate Threads To One

1. Identify which thread is obsolete and which one should be the "master"
2. Post a comment addressing there are duplicate in the "obsolete" thread:
   "There are duplicate threads on the same task so please continue all discussions and updates here: [the master thread]
   For context: Why am I seeing a "continuation" thread in Basecamp?"
3. On the "master" one, post a note with details below:
   "Continuation from thread: [the obsolete thread]
   Below are what we have so far:
   [Include all important links here]"
4. Add everyone from the obsolete thread to the updated thread with a note about moving discussion from [the obsolete thread] to (the master thread].

How to Make a Basecamp Project and Add Preceding Threads

1. Go to Basecamp Home, under Projects click on **Start a new project**.



2. **Name** this project and click **Save**.
3. Next, go to the thread you want to move and click Move.

4. Then select the **new location** where you want to move the Basecamp thread and all its preceding threads.
5. Add everyone in the project.

Finally, don't forget to iterate on the thread to keep your team aware of the changes that you've made.

Naming a project in Basecamp

In terms of naming, for client's we operate according to a tier system. We used to have four tiers, now we have three. The main tiers are

- Platinum
- Gold
- Quickstart

For naming, write **Client 1 – Platinum:** and the name of the client. So for this example **Client 1 – Platinum: Nike**.

First you start off by naming the tier, then a colon and then the client.

Platinum consists of:

1. Anyone that is paying platinum money; $20,000 for a package or more
2. People that have household names, ie. Nike, Nu Skin, Adidas. They might not be ready to start off with a platinum package, meaning we might run brand analysis for $5,000, but we are still going to include them as a Platinum client because they have that potential.
3. The second tier is gold. So **Clients 2 – Gold:** then name of company, **Clients 2 – Gold: Tuft & Needle**.
   Gold consists of:
   1. $10,000 to $20,000 for a package

We used to have 4 tiers, so we are going to have a jump because we used to have a **Silver** tier we're not using anymore. So at some point we'll probably get rid of it in the naming, but for right now you name Quickstart using the number 4. So **Clients 4 – Quickstart:** and the name of the company. These are the smaller guys coming in. So for example **Clients 4 – Quickstart: Closetbox**.

Quickstart consists of:

1. Just comes in on one little thing.
2. From $500 to $5,000.
3. For example, Facebook for a Dollar a Day Package or something small just to get them started.

Those are the three main tiers and how we do the pricing.
There are other cases why you would want to create a project including a Power Hour with Dennis or one of our other specialists. For all those other projects label them **Special Projects**: followed by the name of the project. And you can even put what they came in on. For example: **Special Projects: Tony Robbins Power Hour**

Sometimes there might be specific naming for a specific event. For example **PHX Workshop Attendee: Sunday Vidal**. As people come to our workshops, we create projects for them so they can get our courses.

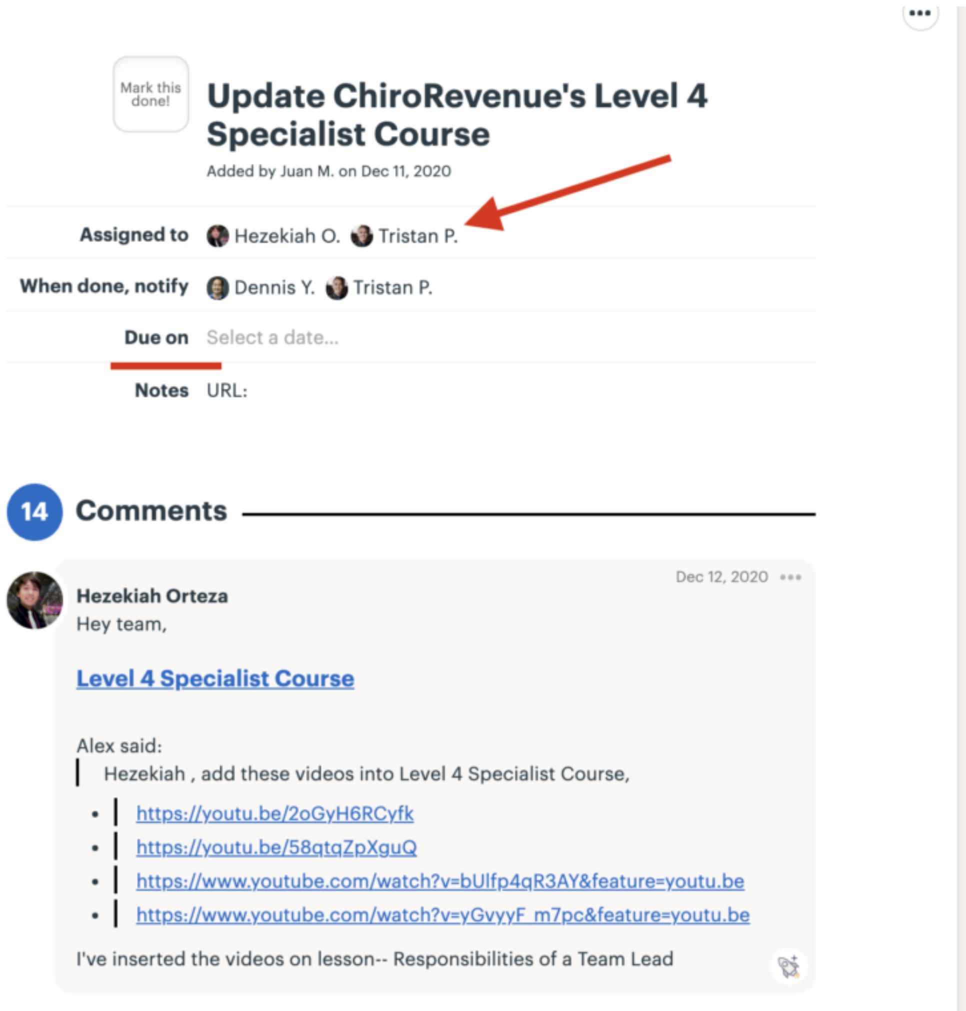
Basecamp To-Dos

A To-Do entry is another way you can communicate with ff members of the project. Any time you see a task that will take more than 10 minutes to do, assign it as a Basecamp task, so we don’t lose track of it in email or in basecamp messages.

If you estimate that the task right in front of you will take you less than 10 minutes to complete, just do it right then, since it’s not worth the headache to load up and project manage. You’ll be able to assign tasks to specific members or clients and also set a due date.

We don't create to-do's for internal assets, since internal assets are on-going (never-ending) assets we continue to optimize via basecamp messages (not tasks).

We know that simple client-level work (done by VAs in 15 minutes or less via our menu) are tasks that we track with end dates-- like operational tasks we outlined and need to get into operations.



Basecamp sends notifications to the person assigned to a To-Do. It will send notifications on the person (or people) assigned at 9:00 AM

1. the day before the due date
2. the day it's due
3. a day after it's late
4. a week after it's late

Most of the time, people will be writing down actionable points after meetings. Other times, your Team Lead or your Project Lead will casually mention an instruction but will not create a To-Do for you in Basecamp. As the person responsible for getting stuff done, you should take it as a given that you should create a To-Do entry for tasks you cannot complete within 10 minutes.

Basecamp To-Dos are not for

- Your personal entry for your personal to-do list.
- Tasks for studying, watching a guide or taking a course.
- Reminders.

How To Create A Basecamp To-Do

1. **Check for previously created To-Do lists.** If there are other To-Do lists within the Basecamp project, check if there is an existing To-Do List where your task belongs to. We should avoid having duplicate To-Do Lists of the same name, purpose and scope. If you see a To-Do list that is appropriate for the task that you're creating, create it in that list.

   For client projects and client tasks, we create BC To-dos within the client BC Projects.

   If you don't know which Basecamp Project to choose, follow this table to determine which BC To-do List to create a BC To-do in.

IF	THEN
You are a video editor VA.	Make a BC To-do in the **General** To-do List of the **BlitzMetrics Content: Internal Video Production** BC Project.
You are an operations VA.	Make a BC To-do in the **General** To-do List of the **BlitzMetrics Operations: Internal Functions** BC Project.
You are a content specialist VA.	Make a BC To-do in the **General** To-do List of the **BlitzMetrics Content: Repurposing** BC Project.
You are a designer VA.	Make a BC To-do in the **General** To-do List of the **BlitzMetrics Design: Design - Depository** BC Project.
You are a partner manager VA.	Make a BC To-do in the appropriate To-do List of the client or partner BC Project.
You are a dashboard engineering VA.	Make a BC To-do in the **General** To-do List of the **BlitzMetrics: Engineering | Domains and Properties** BC Project.

2. **Create a To-Do list.** You'll have to create To-Do Lists for newly created projects. Our Basecamp Basics Guide in our Level 1 Specialist Course teaches us on which threads and tasks should be created depending on the type of project. If you checked the previously created to-do lists and found that none of them are appropriate for the To-Do you're about to create, then you should create a To-Do

list for that task. Place the To-Do List in the appropriate project. Keep To-dos Lists for clients within client projects.

3. **Create the To-do entry.** Place the To-Do in the appropriate project. Keep To-dos for clients within client projects. Keep in mind that the task must be S.M.A.R.T.
    - Specific
    - Measurable
    - Achievable
    - Relevant
    - Time-oriented

The name of the To-do must be a command. In other words, what you write must be in imperative form that starts with an action word plus the important details of the task.

If you need to make sure that you have access to a client's business account, using "Access" as the name of the To-Do is too vague and does not allow for your team members to understand at a glance what they need to do. Using the phrase, "Obtain access to John Smith's Facebook Business Manager" is better since it tells the reader what we need to do, who we're getting access from and what we're getting access to.

4. **Choose the person assigned.** The person assigned is the one that will perform the task or the one "Responsible" in RACI.

5. **Add who gets notified when the task is done.** Add everyone in the "When done, notify" section of the to-do
    1. Chief Executive Officer, Dennis Yu.
    2. The Project Lead.
    3. Assigner, the person who assigned the task.
    4. Those who you must inform of the task's completion.

6. **Apply your RACI training to tag the 4 correct teammates.** Who is Responsible (Doing), Accountable (Managing), Consulted (The Expert), Informed (The Manager's Manager) – Only A's Can Mark Tasks Complete

7. **Set the due date.** By default, set the due date to 2 business days from when you assigned the task. Occasionally, Project Leads or Team Leads will identify a specific date for certain tasks.

8. **Write notes.** Include a task description with associated links to threads, documents, or where to place the results of the task.

Link to the thread where you received the instruction if any. Link to the various files, images and videos that you will be using to accomplish the task. It's better to write these things down now while you remember them rather than going back a day or a few days later and wondering, "What was the title of that video again?". You can even paste the quote verbatim into the Notes section of the To-Do. You never know when you have too many To-Dos and have to delegate it to someone who won't have a clue where to find these things.

How to complete a Basecamp To-Do

1. **Do not mark off your own To-Do as completed.** If you are a manager or level 4 or above, you can mark off your own To-Do as completed.

2. **Link to the next To-Dos if any.**
    1. Enumerate the next steps for the task that you did
    2. Search within the project if someone createscreate the To-Dos for the succeeding steps.
    3. If no one has created the To-Do for the succeeding steps, create them.
    4. Post all the succeeding To-Dos within the first To-Do.

3. **Include a written summary that includes:**
   – What you did
   – The Quality Assurance Checklist, if any
   – Tags those accountable to confirm

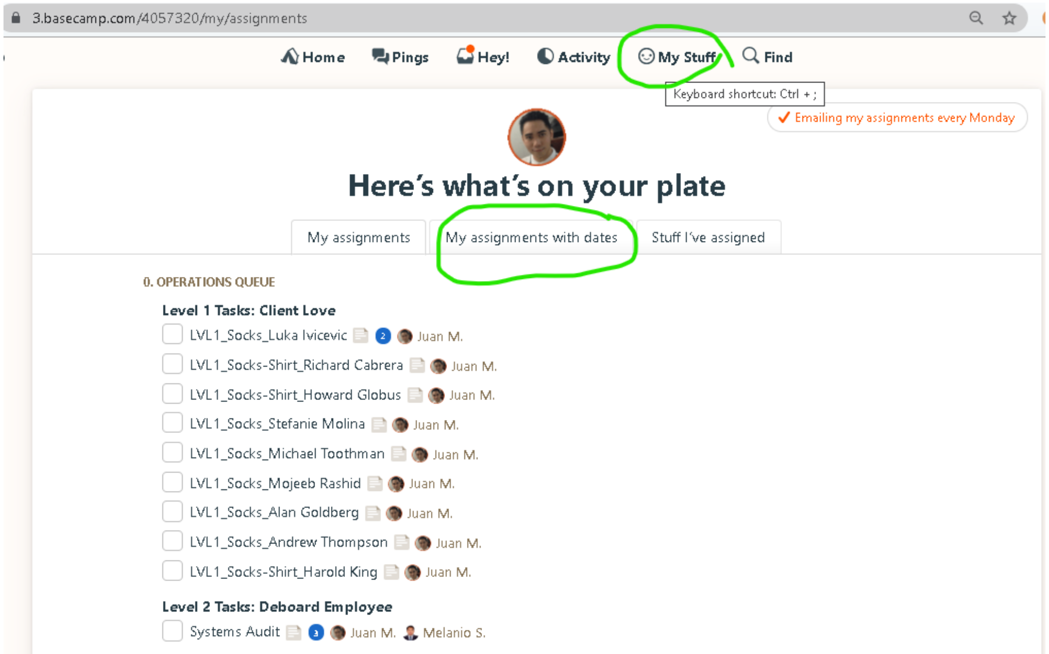
4. **Let the one accountable (A) QA (Quality Assure) your work mark off the To-Do as completed.** The A will write the statement "**Task Audited**" and will mark the task complete. If no one is available to QA your work, keep on following-up with other team leads.

How to Delete a Basecamp To-Do

- **You should never delete a Basecamp To-Do.** Even though the To-Do you're referencing may be obsolete or unnecessary, the details within the To-Do may still be valuable to some team members. Instead, you can archive the To-do.

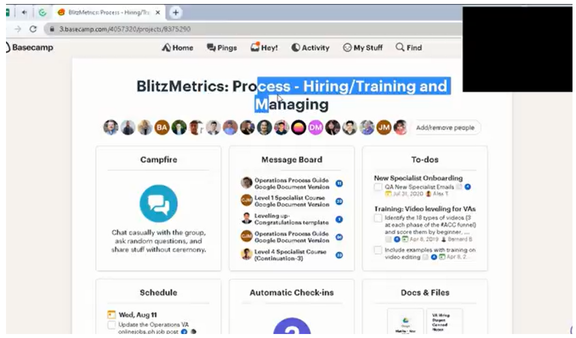
How To Find Your To-Dos in Basecamp

1. Go to Basecamp.
2. Click My Stuff.



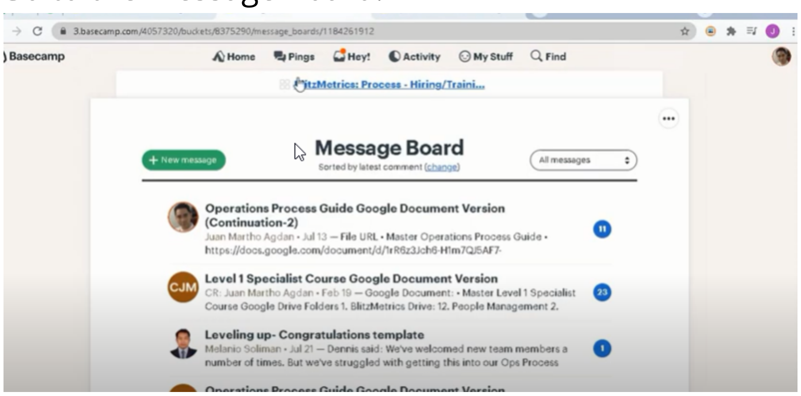
How To Stop Following And Mass Unsubscribe From A Basecamp Project

When you're added to a BaseCamp project you'll get automatically subscribed to a project, and sometimes getting tons of notifications from a simple update will keep you getting sidetracked from your current tasks.

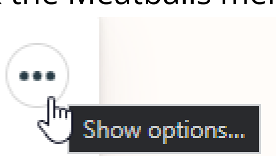


[To Unsubscribe from a BaseCamp Project](#):

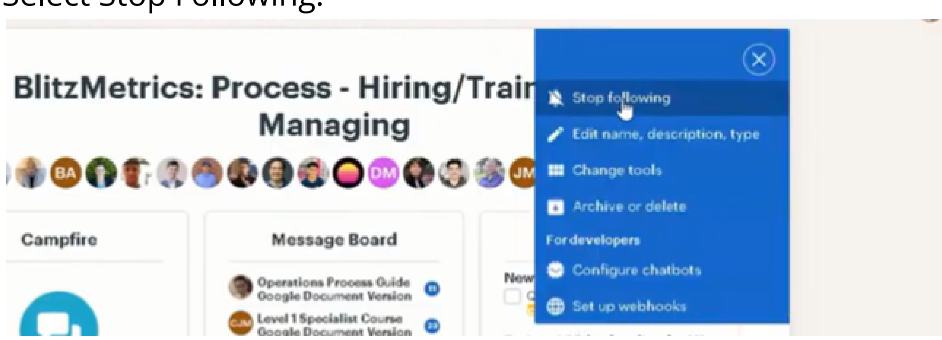
1. Go to the Message Board.



2. Click the Meatballs menu.

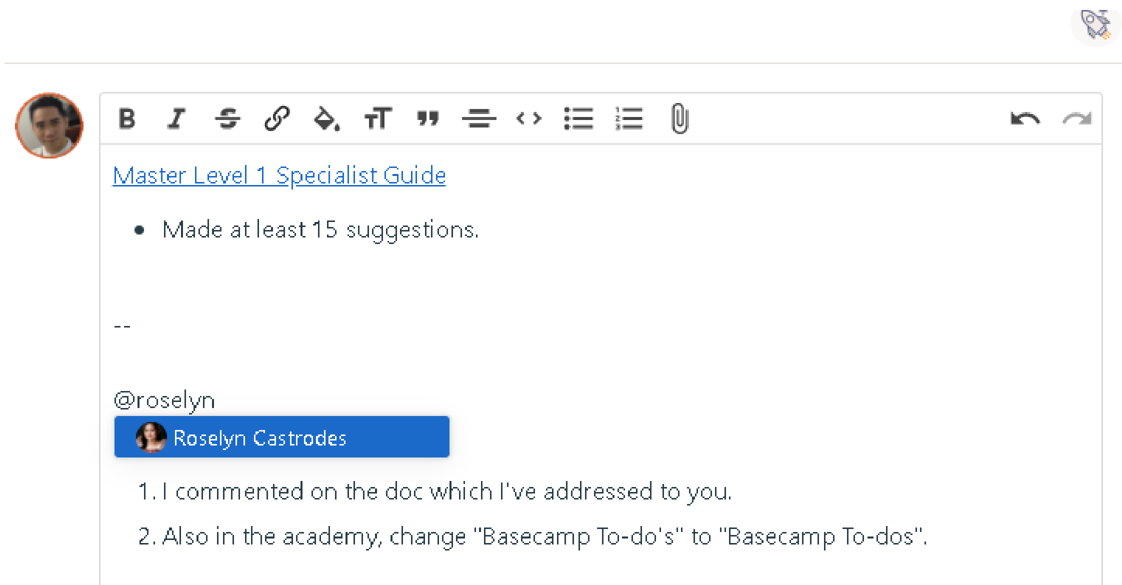


3. Select Stop Following.



Mentions

Mentions or @mentions is a Basecamp feature where you can bring up someone’s name and profile picture while typing in a comment within a Message Thread, To-do or anywhere if you start with “@”.



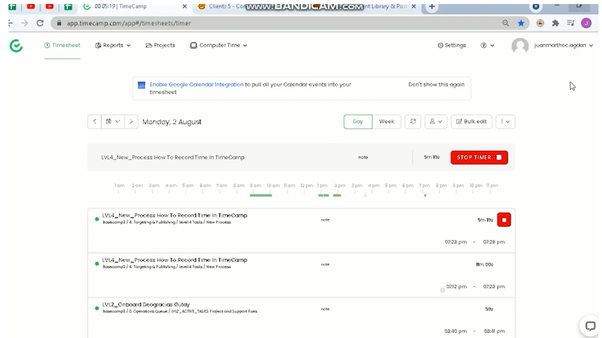
Whenever you @mention someone, Basecamp sends them an email in a completely separate email thread, thus, you must use @mentions minimally.

You can @mention anyone except for Dennis Yu due to the multitude of emails that Basecamp sends a recipient of a mention.

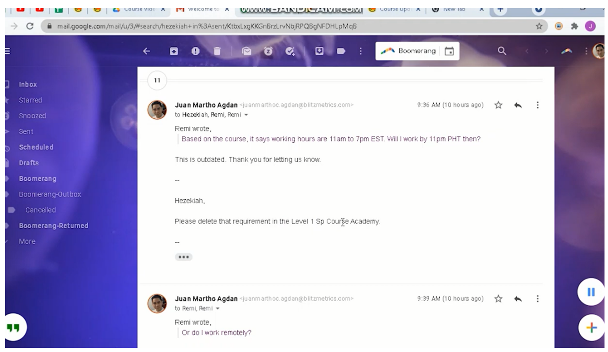
Basecamp Basics: Key Points

- You cannot delete a Basecamp To-Do, but you can archive one.
- Basecamp is where we house all the projects of our clients, it is used to communicate with the client and a good way to also communicate results.
- Post regular updates so that your clients know that there is progress.
- Make sure you are naming the threads following the naming convention by making it as clear and specific as possible.
- “Internal” threads are private threads you can post in basecamp. This means that the clients will not be able to see it. So, if you have a question or need help on iteration you can post an internal thread and team members as well as your team lead will be more than willing to answer them there.
- Always only send out the email updates to people who are important to the thread. It wouldn’t make sense to have the whole company get an email update on a Facebook boosting that you did for a client. Only include the important people this includes your Team Lead, the CEO, and the clients (when applicable).
- When referencing a document, a website, a web page, or any link, make sure you share the link.
- When referencing a document, website or any URL, make sure you share the iteration thread from Basecamp that it’s in, too, since we are always updating. If you share only the document link, we’re stuck at that iteration (even if we have updates since then).

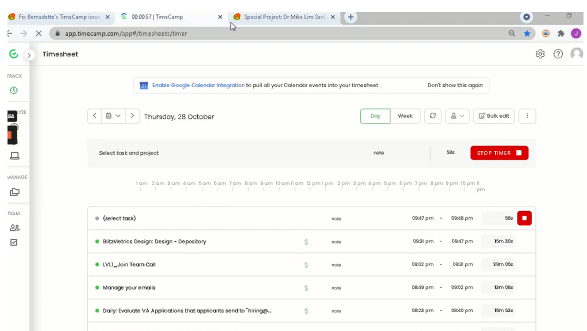
Reporting Time



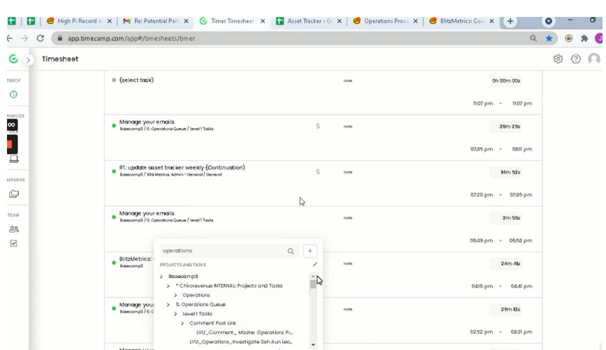
[How To Record Time In TimeCamp]



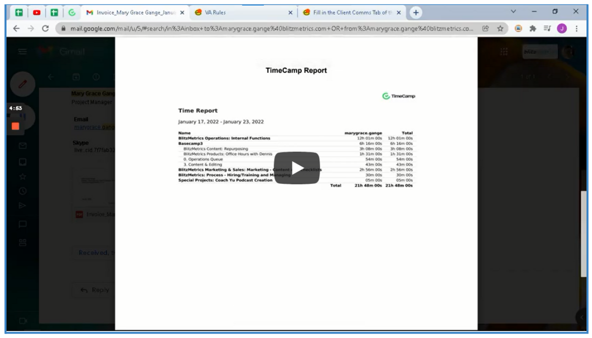
[How To Add A New Time Entry In TimeCamp]



[How To Fix Time Entries By Adding The Correct Basecamp User]



[How To Choose TimeCamp Entry For Course Updates]



[(3:02) What Not To Do When Using TimeCamp]

Everyone should be working a 6-8 hour day, with at least 15-30 minutes built in for synch ups, calls, etc.

Managers can operate before, during and after, but all Specialists (VAs) need to stay within those hours.

Team Call

The purpose of these meetings is to share work-related information to the team and to provide insight in order to achieve the team's objectives. They are also an opportunity to share concerns and clarifications to solve issues that will improve productivity. Each team member share the following:

1. What they did today or yesterday.
2. What they will do or what tasks are on their plate.
3. Optionally, what they need help with.

Then, the team member that finished speaking will call on the next team member that they choose to share next.

We have recurring team call meetings which are held bi-weekly every Monday and Thursday at 9:00 p.m. Hong Kong time.

If you are not able to attend the meeting, make sure you inform the Director of Operations and the team member under the "Assigned to" section of the To-do "LVL1 Biweekly: Fill in the Team Call Attendance tab" by sending a message in the To-do or contacting that team member by other means. You can identify who the Director of Operations is and obtain the team member's contact information in the Team Roster. The team member assigned to this To-do may change so make sure to check who it is.

How To Properly Select A Time Entry For A Team Call

Video Guide: [How To Properly Select A Time Entry For A Team Call]

Here are the steps on how to properly select a time entry for a team call:

1. Go to Basecamp and see if you have access to Operations Queue.
    - If you don't have access, ask either your team lead or an Operations VA/Specialist to grant you access to the project.
2. Go to To-do's, then click Level 1 Tasks.
3. Click LVL1_Join Team Call and then copy the To-do name.
4. Next, go to the Timecamp app. Inside you'll find a Timesheet.
5. At the bottom left corner, press add a new time entry and (select task).
6. Paste the To-do name - LVL1_Join Team Call, then start the timer.
    - Whenever you have a team call, the correct time entry is LVL1_Join Team Call.

How To Select A Time Entry For A Recently Made Basecamp To-do

1. Select the Basecamp Project.
2. Select the To-do List.
3. Create a To-do within the To-do List.
4. Wait at least 60 minutes for the To-do to appear in TimeCamp as a time entry.
5. Select the time entry that has the same name as the To-do that you created in Basecamp.

How To Fill In A TimeCamp Entry For A Completed To-do

A Basecamp (BC) To-do will stop appearing in TimeCamp if the To-do is already checked. In order to let the time entry to appear in TimeCamp again, do the following:

1. Uncheck the BC To-do.
2. Remove all subscribers in the BC To-do.
3. In the BC To-do comment "I unchecked this task since I haven't filled in this time entry for my TimeCamp".
4. Wait 60 minutes for the time entry to appear on TimeCamp.
5. Use the correct time entry in TimeCamp.
6. Then mark off the To-do as completed.

Training Time

We have a BlitzMetrics Academy, which houses courses that teach concepts, strategies and step-by-step instructions for tasks. BlitzMetrics will require you to take some of this training for you to execute specific tasks.

We **forbid employees to bill or charge their time** using TimeCamp's timer while they spend it on studying, training, learning, and answering quizzes in the BlitzMetrics Academy unless someone has specified otherwise.

We have a few other resources in our google drive, namely the 1,000 task library which are full of brief focused training. **Your time to take this training is not billable** unless someone has specified otherwise.

BlitzMetrics **will not pay you to study, train, learn and answer quizzes** unless someone has specified otherwise. You can do all of these outside of work hours.

Though once you master and start working on the application of that training, that is the time where you can start charging for your new skills.

Billable Time

Each task a team member performs (e.g. each video a video editor edits) should have a separate To-do in Basecamp which results in a separate time entry on TimeCamp, rather than one time entry for a bundle of tasks.

For example, video editors may be assigned to create 5 one-minute videos from a 1-hour RAW video. The video editor must create 5 Basecamp To-dos per video with different names . The TimeCamp entry should reflect this since Basecamp To-dos appear as time entries on TimeCamp. So if you edited 5 videos, there should be 5 separate time entries with 5 different names.

As a team member, it is your responsibility to verify that your TimeCamp is accurate and precise since this reflects in your invoice and your billable hours. If the time spent on a time entry is unreasonably high, your team lead, or any higher level team member may reduce your billable hours due to your overbilling.

Billable	**Not Billable**
Answering emails, joining team calls, submitting files, submitting End Of Day Reports	Going to the bathroom, making coffee, grabbing water, etc.
Setting up downloads and uploads, e.g. clicking the buttons and organizing files	The duration of the upload or download.
Video Editing	The duration of rendering or exporting.
Graphics Designing	The duration of rendering or exporting.
Installing applications necessary to do your work, e.g. Zoom, TimeCamp, Skype, etc.	The duration of downloading the software you need, your computer being frozen, your internet being cut-off, troubleshooting hardware issues, turning on another PC to use.

Hour #1 is Inbox Hour

Video Guide: [How to Use Gmail's Search User Interface]

It's the only billable hour per day for checking emails since the rest of communication happens naturally while checking tasks.

Almost everyone should be able to hit Inbox 0 within this time. Most importantly, everyone you should start this hour with a search in your inbox:

1. "From:dennis@blitzmetrics.com"

2. "To: all@blitzmetrics.com"

You will be responsible to properly record your time in Timecamp. There are a few key things to keep in mind while recording your time so you can record it properly. Logan will explain in a brief video a few key points when logging your time.

(79) How to Log Time

When reporting your time in TimeCamp:

Devote at least 50% of our time, if not more to client work unless you have specific permission to work on internal projects. Thus, we can measure value directly to a client — and they can look at the time logs, as well. This means that you should select or create the appropriate client when tracking your time.

Do not ever work on or bill clients whom you have not been assigned to by your team lead. We have had clients questions hours we bill them — for people they do not know working on projects they have not heard about. Of course, we want our internal systems to catch this well before the client does.

Do not retroactively add time. We review any added times (i.e. time that isn't tied to a computer task. So only add all time on the same day it occurs, and make sure it has a description explaining it.

No single time entry should be more than 3 hours long. If however, it is more then you've not broken that task into specific enough components.

Any time you work on a project that day, you should have time charged against it as well as some form of communication via basecamp and/or email. By following #DDD, #CID, and #MAA, your work leaves an obvious trail that others can follow.

Accurately report your time. Be fair and use common sense when recording. We provide our people a lot of freedom, but this also creates opportunity for abuse. Realize that we must make 3X your gross pay to cover operating costs.

To truly #CID effectively, we will only be accepting invoices supported by TimeCamp. We will be incorporating standards to certain tasks based on the training.

Along with these key points here is a TimeCamp Guide on how to get started in TimeCamp and help answer any questions on the steps of how to approach TimeCamp.

Recording Time in TimeCamp: Key Points

50% of your time if not more should be devoted to client work.

Do not bill clients you have not been assigned too. We want to prevent billing the wrong client as much as possible.

Accurately report your time, meaning that if you do a task make sure to record within that day.

Be responsible and record only the time of your work.

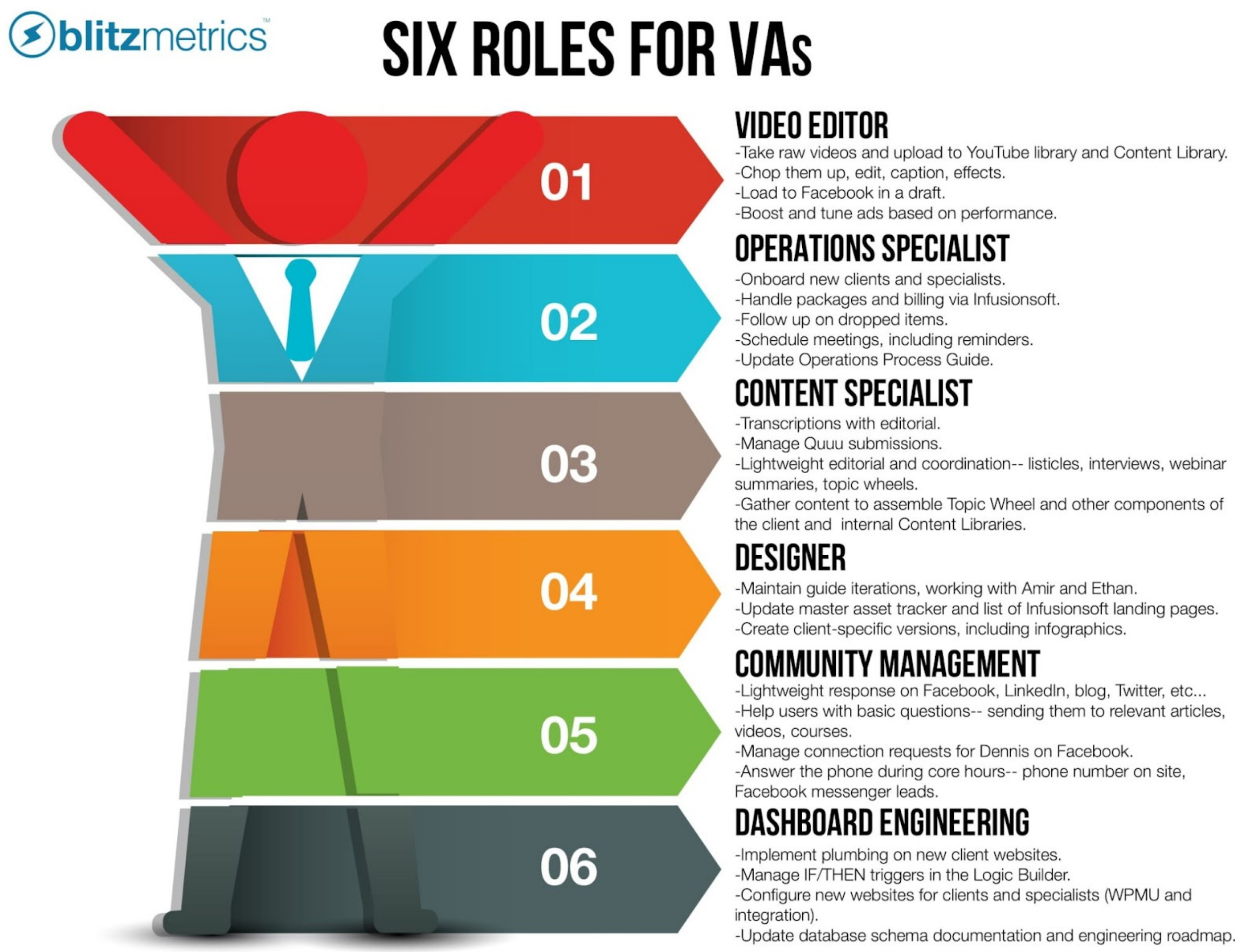
No time entry should be more than 3 hours long, break up your task into more specific parts then execute them to get them done.

Added time will be reviewed, so make sure you only add time all the time on the same day that it occurs.

Add descriptions of your work and task so you know where your time was spent.

Six Roles For Virtual Assistants

There are 6 main roles for a Virtual Assistant (VA). The following chapters will contain guides, concepts and step-by-step instructions on tasks that all VAs of a certain role must learn. For the next few chapters, jump to the chapter that is relevant for you. If you are a Video Editor, BlitzMetrics requires you to study the chapter for the Video Editor. If you are not a Video Editor, you do not need to study this chapter, and you must skip it as well as all the chapters that are not relevant for you.



Video Editor Starter Guide

Study the latest iteration of Video Editing Course Guide here– https://academy.blitzmetrics.com/wp-content/uploads/2020/09/blitz_video_-editing_course_guide-version_03272020_v2.2.pdf

Operations Starter Guide

What Are The Responsibilities Of The Operations Team?

The purpose and goal of Operations extends beyond understanding and implementing the [Social Amplification Engine]() to ensure timely communications, organized records, and proper follow up on all client and internal activities company-wide.

Operations can be separated, like much of the work our specialists perform, into two categories—Client-facing and Internal operations.

Client-based Operations

A. Setting up Basecamp Projects.
B. Integrating GCT Assessments (Goals, Content and Targeting).
C. Verifying Access to Client Assets using the Access Checklist.
D. Delegating tasks according to RACI – Project Management.
E. On-boarding Clients.
    a. Everything from granting access and getting a Basecamp project set up to implementing basic to advanced plumbing (although you will need proficiencies in HTML, CSS, and Javascript to easily learn and implement the more advanced plumbing elements).
F. On-Boarding Office Hours Members.
G. Scheduling Meetings, and Power Hours.
H. Automating Academy Course flows.
I. Filling in a Statement of Work (SOW).
    a. A legally binding contract that outlines the conditions of our agreement with a client.
    b. Explains the services we'll be offering along with details on organization, compensation, timeline, etc.
J. Invoicing and Billing .
    a. While our CFO is in charge of the company finances, we must ensure that the client is set up with a low impact, simple billing method. The CFO sends invoices, and we follow up in the case that the client hasn't paid.
K. Setting up Digital Plumbing.
L. Automation and Document Distribution.
M. Scheduling of Meetings/Power Hours.
N. General Correspondence and Communications.
O. Operations Schedule.

On-boarding Specialists/VA's

Video Guide: RAW-Onboarding Process_10-16-18

Note: Don't use "Junior" in job titles.

☐ Inform the Financial Specialist or an authorized VA that we hired a new Specialist/VA so they can send Non-Disclosure and Independent Contractor Agreements. 1040

☐Provide Job Title of New Hire.

☐Provide Rate of Pay of New Hire.

☐ Team lead extends a welcome with zoom link for Monday's Team Meeting and Wednesday's Office hours.

☐ Add new hire as a Content Manager to BM Clients & Partners, BM Assets & Processes.

☐ Create a BlitzMetrics Google Workspace Account. (Verify if the employee is new or returning) *

☐ Create a Basecamp Account.

☐ Create a TimeCamp Account. 1043

☐ Grant them Manager Access to YouTube. 1044

☐ Create a Facebook Business Manager Account as an Employee. 1045

☐ Send a welcome email together with, always CC: new team member's personal email address.

☐ Request them to log in to our Academy and grant them access to ALL courses.

☐ Add a new entry in Team Roster.

☐ Request addition to OpsTracker in this Basecamp thread.

☐ Create a Basecamp Todo task, titled: P0. Onboard (new hire's name)

• List all the tasks completed and insert a link to the completed Onboarding Checklist

• Assign it to the new hire's Team Lead

• Write: Please invite (new hire's name) to the client's Basecamp projects. If the person needs access to any Basecamp projects, which you don't have access either, please request via email to operations@blitzmetrics.com providing your reasons

Optional

☐ IF the new team member is an account manager, THEN grant login credentials to clients.chirorevenue.com.

☐ Create an Infusionsoft Account (ONLY when someone in-structed and they have passed the Infusionsoft Basics Course in the BlitzMetrics Academy). 1046

☐ Give them login details to Brand24. 1049

☐ Give them login details to Quuu! 1050

☐ Give them a Boomerang! Pro Account. 1051
☐ Give them an Adobe Account (Premiere Pro, Photoshop, Illustrator). 1052
☐ BlitzNation FB Group (Requires Level 2+ for VAs). 1053
☐ BlitzMetrics Academy Members FB Group. 1054
☐ BlitzMetrics VIP Members FB Group. 1055

- If an employee returns within 20 days, you can restore their account instead of creating a new one.

De-boarding Specialists/VA's

Remove Access From The Following Assets:

Mark N/A if they never had access.

- ❑ Google Workspace (Formerly G Suite).
- ❑ Transfer files to your own drive, then move the folder Old Team.
- ❑ Import email to your email address.
- ❑ Basecamp
    - ❑ Team lead needs to re-assign their current projects/tasks.
- ❑ Timecamp
    - ❑ Download member's TimeCamp report for remaining dates of employment.
    - ❑ Delete access to TimeCamp.
- ❑ Facebook Business Manager.
- ❑ Facebook Workplace
- ❑ Infusionsoft
    - ❑ Remove member's account.
- ❑ Team Roster
- ❑ Operations Email List
- ❑ Academy
- ❑ YouTube
- ❑ Boomerang!
- ❑ blitzmetrics.com
- ❑ BlitzNation
- ❑ BlitzMetrics Academy Members
- ❑ BlitzMetrics VIP Members
- ❑ Retrieve company equipment.
- ❑ Remove software subscriptions.
- ❑ Notify the Financial Specialist or an authorized VA when.
- ❑ GoHighLevel (GHL)

Special Cases

Recently, we are receiving email notifications sent to ex-employees regarding their subscription. We must have it checked because:

1. It may still be an active subscription, and we're still being charged.
2. There may be files or documents that we can salvage or use.

For us to retrieve these, we must use their login. Please take note that this only applies to subscriptions and not on ex-employee's email. Here are the steps:

1. Go to https://admin.google.com/ and access your account or username.

2. Add the ex-employee’s email address to your account as an Alias. Since the ex-employee’s address is in your account, you'll be notified if there’s an email from their subscribed apps or platform. (This will save us $12 because Google Workspace charges us $12/ monthly for every account we have).
3. Go now to the application website that you need to retrieve, and use the forget password option.
4. Type in the employee's email address and click on the Lost password option.
5. Check if the process is complete, you’ll be asked to check your email.
6. Check your email, look for the email that is addressed to the ex-employee.
7. Click on the reset link.
8. Access the website using the reset link.
9. Check the items, files or subscriptions.
10. Ask Dennis or Sean if we are going to use the app or subscription. If they said that we need it, change the subscribed email address to access@blitmetrics.com, if possible.
11. Write down the new username and password and update the details in our Access Database if it’s listed there. Do this too even if we won't use the application.
12. Delete now the ex-employee’s email address in your alias. In case we need to access the site again, we can log back in using the ex-employee’s email address and the password you created. Or using the access@blitzmetrics.com if you’re able to change the email address.

Task Follow-Ups

- Make sure to follow-up with internal tasks and guide iterations so that we have constant #CID.

- Use Boomerang to have emails brought back to you at the necessary time to follow-up.

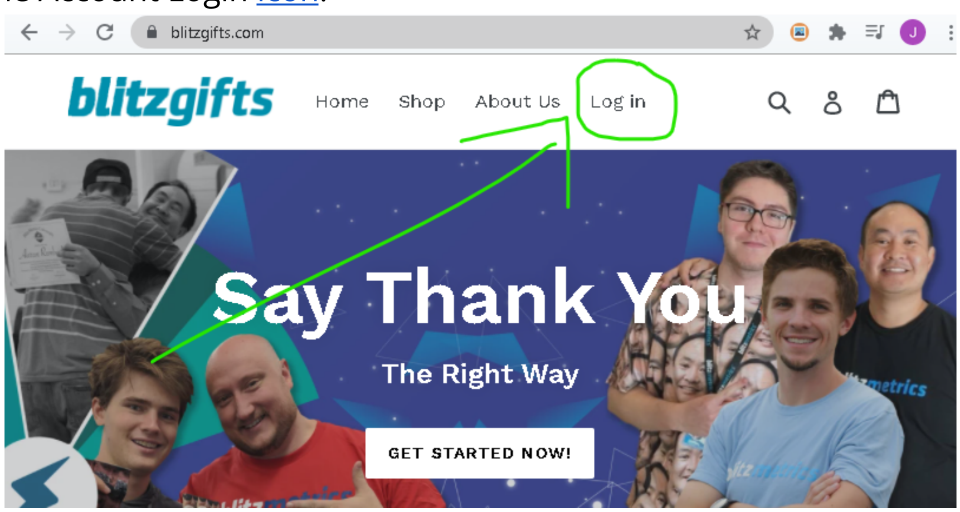
  For example:
  - ★ If you have a Power Hour, you need to be at 4pm on Tuesday. Set up your email to have it boomerang back to you at 3pm that day, so you won't miss it.
  - ★ You want to follow up a task that you gave to your client. You should set a two day boomerang so that you will be reminded to follow-up before it gets placed on the back burner and forgotten.

How To Order Custom Socks On BlitzGifts

Ordering custom socks requires manually entering credit card information as we're currently resolving the quick checkout contact number to Blitz Admin Google Voice number.

Video Guide: How To Personalize Notes For Gift Orders

1. Obtain the login credentials from an Operations Specialist or VA. You can check who is an Operations Specialist or VA in the Team Roster.
2. Determine the net payments the gift recipient has made via Keap (Infusionsoft).
3. Create a To-do in the To-do List Client Love and follow How To Create A Basecamp To-do.
   i. IF Purchase is $100 or more, but less than $500, THEN name the To-do "LVL1_Socks_{Person'sName}".
   ii. IF Purchase is $500 or more, but less than $1,000, THEN name the To-do "LVL1_Socks-Shirt_{Person'sName}".
   iii. IF Purchase is $1,000 or more, THEN name the To-do "LVL1_Socks-Shirt-Guide_{Person'sName}".
4. Go to blitzgifts.com.
5. Click the Account Login icon.



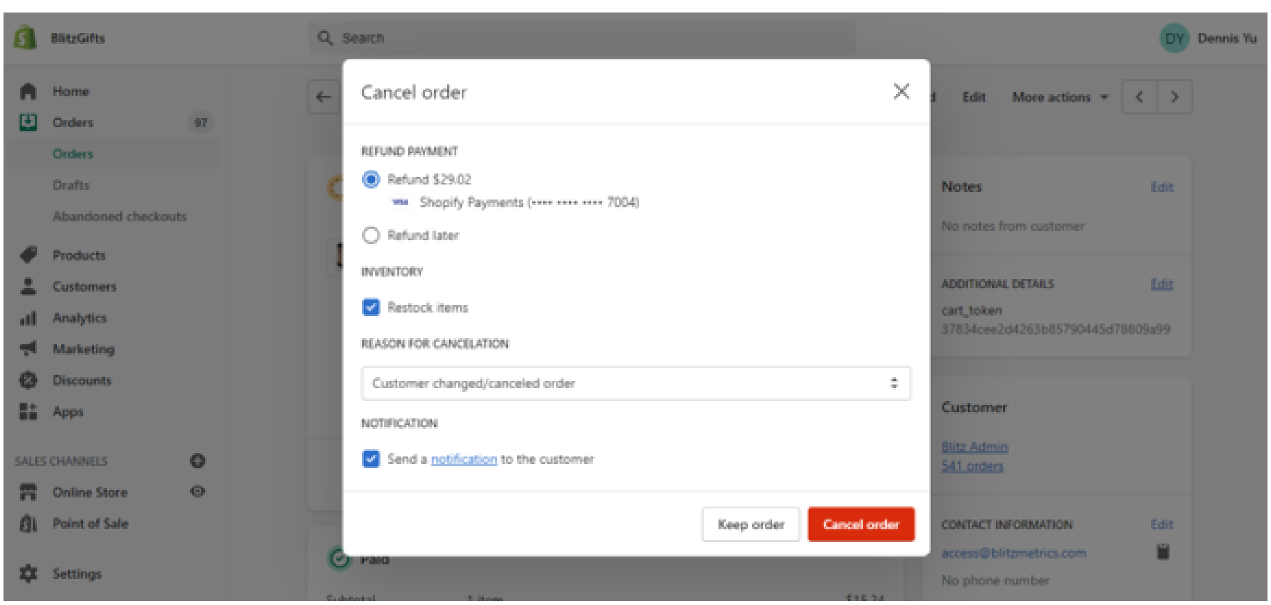
6. Enter our Blitz Admin account login details.
   Login: access@blitzmetrics.com
   Password: (email authorized person for the password)
7. Click Shop, and then select Handwritten Note. (Make sure we're availing the discounted price of $1.82). Input notes then click "Add to Cart". Click Continue Shopping and this time click Customized Socks (Make sure we're availing the discounted price of $15.24).

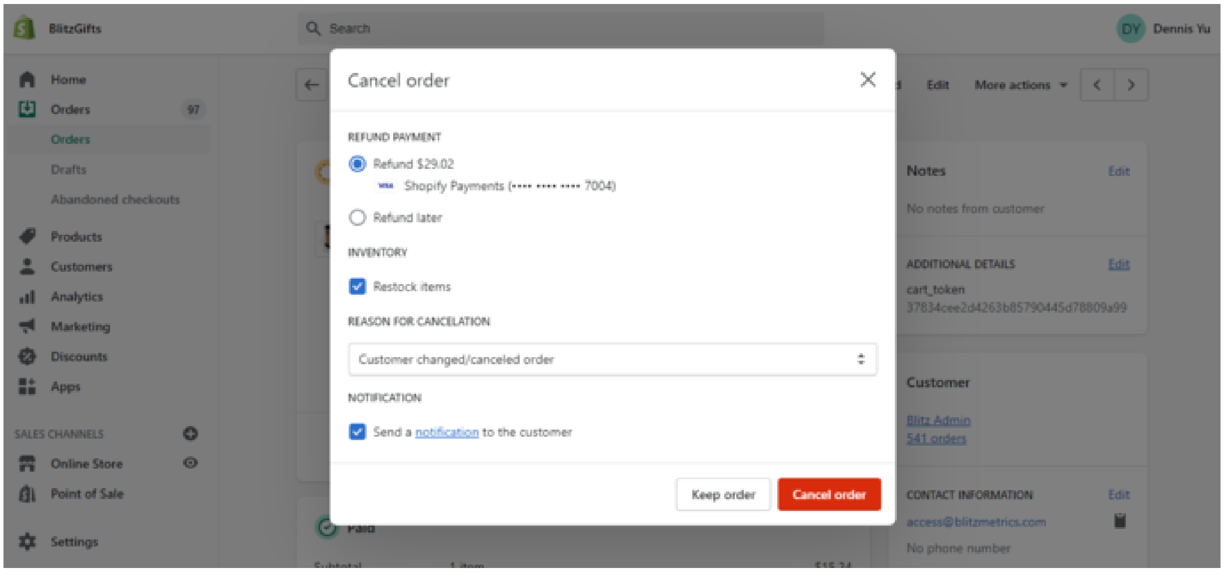
COACHYU

8. Choose the appropriate type and size (usually it's Large for men and Medium for women). Select Face Collage for the background, Number of faces then upload the face photo of the recipient.
9. Enter the coupon code "K7F5H5T2" then click "Apply Coupon." You may write "Please match handwritten notes (client)" as notes for your designer. Click "[ADD TO CART]()".
10. Before you click CHECK OUT, make sure that the [Subtotal is the discounted price]() ($17.06).
11. Enter the client's shipping address. In the order notes, you may write "Please match handwritten notes of [client]." then click Place Order.
    a. Keap (Infusionsoft)
    b. Person's Basecamp project if any.
    c. Facebook page,
    d. Their website,
    e. Ask them for their shipping address by emailing them.
12. Payment: Enter our company card details. (email authorized person for card & billing details). Remember me: Type our Google voice number +1 231 412 7522. Our company card and number details have been saved in VideoSocks already. In this case, we can skip this step.
13. After successful payment, the Order confirmation page will appear. Copy the Order Number and paste it on our [Gift Tracker sheet]().

How To Cancel an Order On BlitzGifts

1. Go to Orders and search for the Order #.
2. Click the order that you want to cancel.
3. Click More actions, then select Cancel order.
4. Then confirm the Cancel order.




BlitzGifts
Search
Dennis Yu
Home
Orders
Drafts
Abandoned checkouts
Products
Customers
Analytics
Marketing
Discounts
Apps
SALES CHANNELS
Online Store
Point of Sale
Settings
Cancel order
REFUND PAYMENT
Refund $29.02
Shopify Payments (•••• •••• •••• 7004)
Refund later
INVENTORY
Restock items
REASON FOR CANCELATION
Customer changed/canceled order
NOTIFICATION
Send a notification to the customer
Keep order
Cancel order
Edit
More actions
Notes
No notes from customer
ADDITIONAL DETAILS
cart_token
Customer
Blitz Admin
541 orders
CONTACT INFORMATION
access@blitzmetrics.com
No phone number

Gift Ordering - Clapboard

1. Login to our Amazon account.
2. Go to your account details then click Your Orders. You will find the item named "Zacro Acrylic Film Clapboard - 12 x 10in Plastic Film Clapboard Cut Action Scene Clapper Board with a Magnetic Blackboard Eraser and Two Custom Pens." Once you have seen it, choose Buy it again.
3. Find the same item then click Add to Cart.
4. Go to your shopping cart, check if you have the same item. Once correct, click "Check out Amazon Cart." Also put a check mark on the box beside the sentence, "This order contains a gift".
5. Click "Check out Amazon Cart" then enter password.
6. Click "Continue" for the business order information.
7. Enter the client's shipping address.
8. For "Choose gift options," enter your gift message then click Save gift options and continue.
9. Click "Visa ending in 7004" then "use this payment method".
10. After you have reviewed your items, place your order.
11. After successful payment, the Order confirmation page will appear. Copy the Order Number and paste it on our Gift Tracker sheet.

Gift Ordering - T-shirt

We will send T-shirts to people who have an accumulated spend of $500 dollars or more.

Suppose a client has purchased 3 courses of $200 each, THEN

- 3x$200=$600
- $600 > $500.
- Therefore, BlitzMetrics must send a T-Shirt.

Suppose a client has purchased a $1,000 package once, THEN

- $1,000 > $500
- Therefore, BlitzMetrics must send a T-Shirt.

How to Order T-shirt

1. Identify accordingly what color of shirt to order for the intended recipient. We have three colored shirts-- blue, red, and black-- corresponding to:
    - Clients (local service businesses who pay) get blue shirts.
    - Partners (agencies who have signed up in our program) get a black shirt.
    - Specialists (full-time, dedicated internal people who are building systems and have started at Level 1) get a red shirt.
2. In order to avail of discounted rates, place bulk order of shirts--send email to Ari Jacobs (ari100200@gmail.com) instead of ordering through the website of Promos Online.
3. For every batch or bulk order, create a new tab--duplicate the T-shirt Order template tab of the Gift Tracker Google Sheet, fill out all the details and edit the tab name "Shirt Order-MMM YYYY" to current month and year (e.g. Shirt Order-JUN2021). Write the personalized intro (opening personalized sentences) for every person under the column labelled as "Gift Note".
4. Create a one-page personalized letter (canned letter for each type, but with a personalized intro at the start) for every person using these templates. Make a copy and edit the highlighted parts:
    - Client Canned Letter
    - Partner Canned Letter
    - Specialist Canned Letter
5. Add the link to each personalized letter under the column labelled as "FINAL LETTER" of the new (or current) T-shirt bulk order tab. Ari will print out one page to attach for each T-shirt.
6. Send email to Ari, with the specific link to the T-shirt bulk order tab, for him to fulfill the list of our orders (he already had access to the Gift Tracker Google Sheet).

How To Order A Printed Book Or Guide As A Gift

To order a personalized book we need to:

1. Determine the course to be printed. We need to understand their goals. Dennis may tell us or the account manager finds out during the welcome call.
2. Do a light reskinning by updating the cover with theme/color/logo of person plus header/footer color & logo.
3. Place the file in a folder dedicated to documents for that customer. I created a shared drive on the "access" email account. This way we can easily come back to those docs and they don't get mixed in with ours.
4. Book requires a QA prior to printing.
5. Print the book and have it shipped directly to them.

Print shop Dennis recommended:
https://floridacopies.com/

Features of the book:
https://drive.google.com/file/d/1u6cjRihnAyAGgKzv5s

Community Management

- Lightweight responses on Facebook, LinkedIn, blog, Twitter, etc.
- Help users with basic questions-- sending them to relevant articles, videos, and courses.
- Manage connection requests for Dennis on Facebook.
- Answer the phone during core hours-- phone number on site, and Facebook messenger leads.

Managing Public Figure Pages

Initial Setup

Create and use a public figure page to boost your personal brand.

1. Understand the pre-reqs for building a page.
    a. Be willing to produce video.
    b. Have something to teach.
    c. Have a long-term mindset.
2. Get the same profile picture across all platforms.
3. Go to Facebook Page Creator and start creating your page.
4. Connect to Business Manager.
5. Create a Facebook ad account.
6. Start boosting posts on Facebook using your Ad account.
7. Plumbing- Set up tracking.
8. Content: What to post.

On-going Page Maintenance

1. Inbox Management
2. Engagement Management
    a. Shares
        - Like all shared posts.
        - Comment on the shared post saying “thanks for sharing!”
3. Comments

    Positive Comments:
        - If from a public figure, ask if we could quote them on that.
        - Else, reply with a “thank you note”, or appropriate response.
        - Keep track of positive, high authority comments in your content library.

    Negative Comments:
        - Hide all negative comments.
        - Block persistent negative comments from the same person.
        - Likes/Reactions
        - Invite people to like the page. (**Note**: Facebook has a limit of 500 invites per day or you’ll get blocked).

Workshop Fulfillments

Threads to create in Basecamp for workshop attendees:

- Strategy Assessment.
- Goals Sheet (Top 3 things they want to accomplish with us).
- Latest Courses.
- Access Checklist.
- Comments / Questions (easier for them to message us before, during, and after workshops).
- Optimization thread (good to start practicing light #MAA).
- Follow up thread.

1. Obtain Attendee List
   When a workshop is scheduled, there are two ways in order to obtain this list:
   Infusionsoft
   - Search for the specific order form and access contacts that have completed these forms.

   Google Sheets made by the Team Organizing the Workshop
   - Google sheet file will be made with information relevant to the workshop.

   Components of the Google Sheet:
   1. Client Number.
   2. First Name.
   3. Last Name.
   4. Position – Company.
   5. LinkedIn Profile.
   6. Twitter Profile.
   7. Basecamp Project.
   8. E-mail address
   9. Paid.
   10. VIP?
   11. Amount ($).
   12. Notes.
   13. Flight/Return Ticket Purchased.
   14. Phone number.
   15. GCT Completed.
   16. Access Checklist.
   17. Plumbing Audit.
   18. Hotel Room Reserved.
   19. Notified of Confirmation.

20. Food allergies.
21. BlitzMetrics Coach.
22. Content Library.
23. Public Figure Page.
24. Stock Size
25. Favorite Snack
26. Favorite Food
27. Favorite Non-Alcoholic Drink

2. Create Basecamp projects for all attendees. Use template title: Training “Place” “Date” - QuickStart: “Attendee Name.”
    - For Personal Brands/Non business attendee’s please use: Training PHX 6/19-21: (Client Name).
    - For attendees representing Businesses please use: Training PHX 6/19- 21: (Business Name).
    - Please check with ticket purchasers (for business attendees only) if they will have multiple people coming to represent their company. If yes, then each additional person they bring requires their own purchased ticket, but does not require a separate project.

Follow-up Procedure:

1. BEFORE
    - One week before: to see if there are any questions.
    - Day before: send out schedules to see what if anything anyone needs.
    - Day of: Schedule changes.
2. DURING
    - Communicate constantly.
    - Answer any questions.
3. AFTER
    - Make sure we fulfilled our end of the bargain.
    - Keep guides and courses up to date.
    - Help people with any follow-up questions.

Conference Fulfillments

Before

Research the speaker and topic the night before.

During

1. Be ready to take pics and record videos after as the opportunity arises.
2. Take notes.
3. Have your own business cards ready to hand out to the presenter and other people you connect with afterwards.
4. Be prepared to take video after the event. Remember, you want to collect “testimonials”, so you might give people who are willing to be on camera a prompt “What I learned tonight at [event] was…”, and ask them to just speak for a minute.
5. Take pictures and videos documenting the event and experience. These will be saved in our drive as part of our authority collection.

After

1. Store pictures from the events in a shared drive like Dropbox or Youtube.
2. Follow up with attendees.

Collect Video Testimonials from Events

1. Find a quiet place with good lighting.
2. Film horizontally.
3. Lead them in with a question, the easiest being “What was your biggest take away”.
4. Keep the clips under a minute.
5. Upload these to dropbox/YouTube when they’re finished.

Hiring Specialists/VA's

1. **Create a job posting on Onlinejobs.ph**

Include simple task instructions that will weed through the pack of applicants. Simple instructions they need to follow in applying. Examples: Specific email subtitle, answer math questions)

2. **Send them content to study— (Have the make a 1min video or write about what they learned)**
    - Allows you to test how well they can grasp concepts
    - Tests their English
    - Shows how fast they can take action
3. **Have them fill out a Goals Sheet (Short, medium, long term - Person, Physical, Professional)**
    - Shows their character
    - We can see how we're able to help them achieve his goals
4. **Have them Create a One-Pager**

(A page with all this information)

- Onlinejobs Resume, Normal Resume, videos they've made, Goals sheet
- You do this so it organizes their information. It also is another test to see if they can follow instruction.

5. **Interview via Skype via Video Chat - (Makes it personal)**
    - Ask questions over the content you had them review.
    - Ask other intelligent questions that correlate with your niche.
6. **Assign them a simple test project**
    - Use this to test their ability to execute with instruction.
    - If they pass then= Hired
    - If they fail at any step of the way they are DQ. If its a minor fail, you can give them another task to see if they can make up for the mistake.

Three things we go by when looking to hire Should we hire?

- No
- Maybe
- Heck Yes

VA Hiring Process

Six Roles for VAs

1. **Video Editor**
    - Take raw videos and upload them to YouTube library and Content Library.
    - Chop them up, edit, caption, and effects.
    - Load to Facebook in a draft.
2. **Operations Specialist**
    - Onboard new clients and specialists.
    - Handle packages and billing via Infusionsoft & Zendesk.
    - Follow up on dropped items.
    - Schedule meetings, including reminders.
    - Update Operations Process Guide.
3. **Content Specialist**
    - Transcriptions with editorial.
    - Lightweight editorial and coordination-- listicles, interviews, webinar summaries, topic wheels.
    - Gather content to assemble Topic Wheel and other components of the client and internal Content Libraries.
4. **Designer**
    - Maintain guide iterations.
    - Update master asset tracker and list of Infusionsoft landing pages.
    - Create client-specific versions, including infographics.
5. **Community Management**
    - Lightweight response on WordPress blog, Facebook, LinkedIn, and Twitter.
    - Help users with basic questions-- sending them to relevant articles, videos, courses.
    - Answer the phone during core hours-- phone number on site, Facebook messenger leads.
6. **Engineering**
    - Implement plumbing on new client websites.
    - Manage IF/THEN triggers in the Logic Builder.
    - Configure new websites for clients and specialists (WPMU and integration).

Automated and Manual Processes, and Systems Maintenance
Infusionsoft Tasks

A. RACI – Project Management
B. Follow-Up
C. Specialist On-boarding
D. Organization and Guide Iteration

Recurring Tasks
Responding to leads, customers, specialists, VA's, partners, anyone who emails Operations.

How To Reply To An Operations Email

1. Identify the dependency.
2. Verify that there is an unfulfilled dependency.
    a. IF another internal team member has fulfilled the dependency, THEN archive the email or email thread.
    b. IF there is an unfulfilled dependency, THEN
        i. Identify the bucket or category that the email falls under.
        ii. Go to the guide for that bucket or category.
            1. General Inquiry.
            2. Operations Email Of An Academy User Who Cannot Login.
            3. Operations Email Of An Attendee That Completed A Challenge To Record A Video.

How To Take The Content Of An Email and Create A Task or Thread For It In Basecamp

Watch this quick video tutorial.

1. Carefully read and understand the email that has been addressed to you.
2. Go to Basecamp and select the right project.
3. Before creating a to-do, make sure that there are **no previously created tasks with the same name**.
4. If none, click **Add a To-do**.
5. **Put the Description or Title of your To-do**.
6. **Assign the Team Members based on RACI principle**. The person assigned is the one that will perform the task or the one "Responsible" in RACI.
7. **Add who gets notified when the task is done.** Add everyone in the "When done, notify" section of the to-do
    a. Chief Executive Officer, Dennis Yu.
    b. The Project Lead.
    c. Assigner, the person who assigned the task.
    d. Team lead of the assignee.
    e. Those who you must inform of the task's completion.

8. **Set the due date.** By default, set the due dates for P0, P1 and P2 tasks 1 week from the day you're creating the To-Do. Set it at 4 weeks after if it's a P3. Occasionally, Project Leads or Team Leads will identify a specific date for certain tasks.
9. **Write notes.** Link to the thread where you received the instruction if any. Link to the various files, images and videos that you will be using to accomplish the task. It's better to write these things down now while you remember them rather than going back a day or a few days later and wondering, "What was the title of that video again?". You can even paste the quote verbatim into the Notes section of the To-Do. You never know when you have too many To-Dos and have to delegate it to someone who won't have a clue where to find these things.

How To Reply To An Operations Email : Course request from Pakistan- 1M Jobs for Pakistan

All our courses will be free. They will take our courses, finish all the exercises in the courses, and show that they are capable. If we see their potential, we can give them some tasks and eventually hire them.

Here are the steps they need to follow:

a. Join: https://www.facebook.com/groups/dennispk/
b. Make a One minute video about themselves, what they do.
c. Post it on their Social media, and send the link to hiring@blitzmetrics.com

When they accomplish the 3 steps provided, do the following:

a. Create a Blitz Academy account for them.
b. Provide them with one free course.
c. Use this canned message for Course requests from Pakistan.

How To Reply To An Operations Email Of An Attendee That Completed A Challenge To Record A Video

WHEN TO USE: When an external person sent an email to **operations@blitzmetrics.com**, or **stephanie@blitzmetrics.com**; and who is an attendee for a BlitzMetrics event, or an event that an internal team member has been a speaker of, and the external person completed a challenge to record a video of themselves.

HOW TO USE:

1. **Verify which event the sender attended.**
    a. If the sender indicated the event, then proceed to step 2.

    b. If the sender does not indicate the event the sender attended, then ask the sender which event the sender attended and boomerang the message thread 3 business days later; if the sender has not replied after 3 business days, follow up.
2. **Verify if the sender has fulfilled the challenge to post a one-minute video to social media.** If all of the following are true, proceed to step 3.
    a. Viewers can view the video (video is not blacked-out).
    b. Viewers can hear audio (audio is not muted).
    c. The public can access the video.
3. **Determine the reward for the challenge.** Sometimes the reward is 1-3 PDF guides that we sell while other times, the reward is the PDF file of the presentation that BlitzMetrics' presenter used.
4. **Formulate the course offering email.**
    a. Write a one-sentence personalized response specific to the sender.
    b. Insert corresponding canned note.
5. **Send the course offering email.** Boomerang the message thread 3 business days later; if the sender has not replied after 3 business days, follow up.
6. **Formulate the message containing the reward.**
    a. Write a one-sentence personalized response specific to the sender.
    b. Insert corresponding canned note with hyperlinks to the URLs to the courses that the sender chose from the Asset Tracker.
7. **Send the message containing the reward.** Boomerang the email to return after 5 business days from the day you sent the message containing the reward.
8. **After 5 business days, send a follow-up message.**
    a. Write a one-sentence personalized response specific to the sender.
    b. Insert corresponding "Canned Note 6" asking the sender about the sender's progress with the course or courses.

Qualifying Clients

The guide versions of the courses should contain what's already in our presentations. Otherwise the training will be out of sync.

When we can keep the underlying guides and presentations in check, then we can roll them up to the Master Guide and Master Presentation.

If we update the Master Guide and Master Presentation with items that should first belong in underlying guides (like the Digital Marketing Training System-- stuff like what happens at each level), we get out of sync quickly.

Team Roster Updates

Suppose we have a Team Member named Jane Doe, we'll have to update the Team

Roster. If Jane Doe levels up, her title may change but not always (e.g. from "Analytics Specialist" to "Director of Analytics".) If her level used to be "3", change it to "4". If she is a Team Lead or Coach of her own team, e.g. John Smith and Bobby Leigh, then John Smith's and Bobby Leigh's Coach in the Team Roster will be Jane Doe.

How To Update The Team Roster's Internal Tab

The team member that will do the following may be an operations specialist designated to maintain the Team Roster or the Operations Tracker.

1. Fill in any blanks in the following columns:
    - Name
    - Level
    - Coach
    - Email
    - Skype
2. If there are blanks, consult the onboarder (Melanio Soliman as of March 1 , 2021) by commenting in the cells while @mentioning Melanio.
3. If the person in the "coach" column is not in the "name" column, consult the onboarder (Melanio Soliman as of March 1 , 2021) by commenting in the cells while @mentioning Melanio.

Remarks:
1. You can check the Team Leads in our "Operations Tracker" or "Team Roster".
2. If the Team Member has a box of people under them, then he or she is a lead with the people under as their team members.
   Example to the right:
3. If you don't know the contact information of a team member, email that person directly or consult an onboarder.

Project Tracker Updates
1. Under the "Accountable" column, write people's names such that they're the same with the Team Roster.
2. Sort the rows based on these criteria. The most important starts at the top.
    a. Level of the Accountable column — highest level at the top.
    b. Hire date of the Accountable column — if they're the same level, the one at the top should be the one that got hired first.
    c. Paying versus free — paying at the top.
    d. Enterprise versus others — enterprise at the top. 2.5. Monthly revenue —

highest at the top.

3. Remove those who are no longer with BlitzMetrics — Ben, Alex, etc.
4. Under the "Number of Boxes" column, write "1" if not an enterprise project, "3" if an enterprise project.

Internal Guide Updates

Google Doc versions of our checklist guides are **INTERNAL GUIDES** in finer detail so that **internal resources can execute these steps**.

Internal users (our team members):

- Have access to specific systems that we've integrated to help us speed up the work-- increasingly so, because we are trying to automate the whole thing. Of course, businesses who buy a $7 guide don't get access to these, except the dashboard for metrics. And it wouldn't be helpful to show them our internal access tasks/explanations.
- Task verification and QA-- of course, we don't provide human support to non-clients. And given that they're not working for us, they don't have to agree to or abide by our standards, like what FancyHands has for their assistants. But we can provide automated follow-up in Infusionsoft and the dashboard to nudge non-clients along for the DIY path.
- Payment and job progression-- to get paid per hour/task based on level, as in our leveling system. This is the specialist track-- running parallel to the business track-- not what a busy business owner would want to understand nor spend sufficient time to do themselves.

The internal guides should be built from the purchasable guides-- not the other way around. However, if we come across a better way to do things, then we update the purchasable guides.

TimeCamp Follow-Ups

Check if anyone needs Timecamp support

Operations Tracker

The Operations Tracker is a document that shows an overview of the business operations of the company. The Operations Tracker shows many things including a diagram of the content of the Team Roster.

We must update the Team Roster first since it is what feeds the team-related information in the Operations Tracker such as:

- Title
- Level

- Coach/Team Lead

Suppose we have a Team Member named Jane Doe, we'll have to update the Team Roster. If Jane Doe levels up, her title may change but not always (e.g. from "Analytics Specialist" to "Director of Analytics".) If her level used to be "3", change it to "4". If she is a Team Lead or Coach of her own team, e.g. John Smith and Bobby Leigh, then John Smith's and Bobby Leigh's Coach in the Team Roster will be Jane Doe.

The Operations Tracker contains the following sections:

Team View Page—overview of the company's teams, team members, managers and hierarchy.

Course Catalog—summary of the live courses.

Access—a list of team members to obtain access from in various websites and platforms.

Partners—list of external partners.

Badges—list of badges that a student can obtain when they take courses.

Guides/Courses Updates (QA, nudges, fixes, etc)

Managing Public Figure Pages

A. Check Team Roster for Changes

B. Check Project Tracker for Changes

C. Follow up with people about hours worked (reference Team Roster hrs/week and do necessary follow-up).

D. Send account password updates to the team members.

The Role Of Operations To Ensure Reliability

The biggest problem we face, have ever faced, and will continue to face is a combination of reliability and competency. It's the same challenge every company faces, especially if they work with young adults, since you're having to overcome low reliability and low competency-- a deadly double that's compounded by the "lambos and mansion" mentality and Dunning-Kruger.

These failures hurt us in many ways-- we lose the on-going revenue we would have had and then we develop a bad (but deserved) reputation for ditching clients.

Competency and reliability-- we need both. The role of Operations is to ensure reliability, which doesn't mean that specialists and team leads can just ignore clients or not need to respond. Operations should kick in only as necessary-- like an emergency brake. The CEO, Dennis, is the last line of defense, so if he has to chase things, then something has gone quite wrong in multiple phases beforehand.

RACI primarily addresses the reliability component, which is why #DDD and #CID together allows for graceful failure. Look at how FH and Uber have models built on graceful failure-- it allows them to scale even with unreliable and incompetent workers as inputs. Consider why they still function and how process + enforcement is so key to what we do. At scale, you'll see what we truly face is a process issue, since training up elite, internal folks doesn't scale.

How To Publish The Course Catalog In A Facebook Group

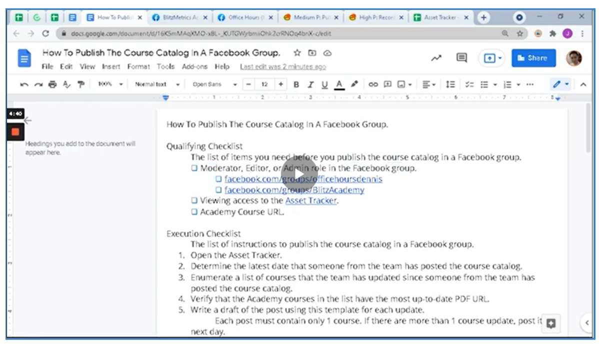
Qualifying Checklist

The list of items you need before you publish the course catalog in a Facebook group.

- ❑ Moderator, Editor, or Admin role in the Facebook group.
  - ❑ facebook.com/groups/officehoursdennis
  - ❑ facebook.com/groups/BlitzAcademy
- ❑ Viewing access to the Asset Tracker.
- ❑ Academy Course URL.

Execution Checklist

The list of instructions to publish the course catalog in a Facebook group.



How To Publish The Course Catalog In A Facebook Group

Open the Asset Tracker.

1. Determine the latest date that someone from the team has posted the course catalog.
2. Enumerate a list of updated courses since the last time that someone from the team has posted the course catalog.
3. Verify that the Academy courses in the list have the most up-to-date PDF URL.
4. Write a draft of the post using this template for each update.

   Each post must contain only 1 course. If there are more than 1 course update, post it the next day.

IF	THEN use the template.
The course is new.	[Course Description] [AcademyCourseURLOfNewCourse]

An existing course has a new update or new version.	We have updated the course below with the latest information. [VersionNumber] [AcademyCourseURLOfUpdatedCourse]

Example for a new course:
"
SEO is an immensely powerful and important part of content strategy, and it intertwines with cross-posting and other pieces of a good content strategy.

This course will help you get up to speed on how to make these fixes – and why we make them. Most of these fixes require only a fundamental understanding of SEO, but what's more important as a strategist is understanding why we make each fix and the impact those fixes have.

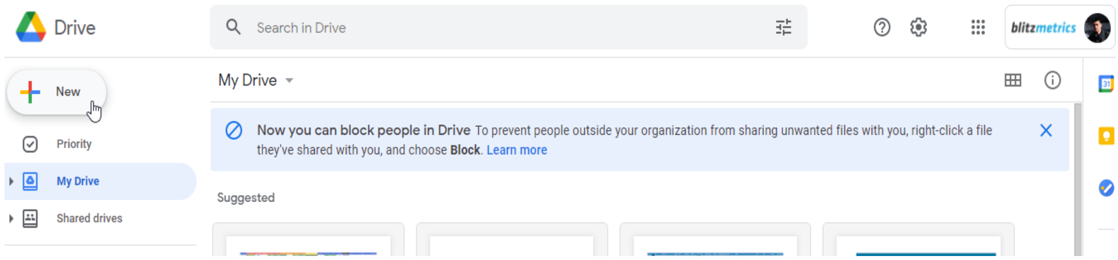
https://academy.blitzmetrics.com/courses/seo-101-mini-course/
"

Example for when we update an existing course.
"
We have updated the course below with the latest information.
v8.2 https://academy.blitzmetrics.com/courses/cmc/
"

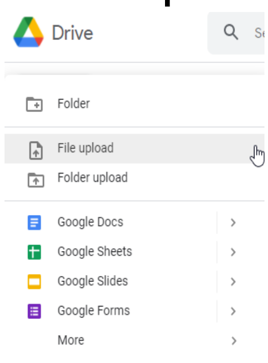
5. Download or screenshot the cover page of the PDF Guide.
6. Upload the image to the Facebook Post.
7. Post the draft.

How To Upload Pillar Content (Long-form Video) to Google Drive

1. Open the Google Drive folder [Podcasts & Interviews](#).
2. Click New.



3. Click **File upload**.



4. In the dialog box that appears, locate and select the file on your computer.
5. Then, click **Open.**

How To Transcribe Pillar Content (Long Form Video)

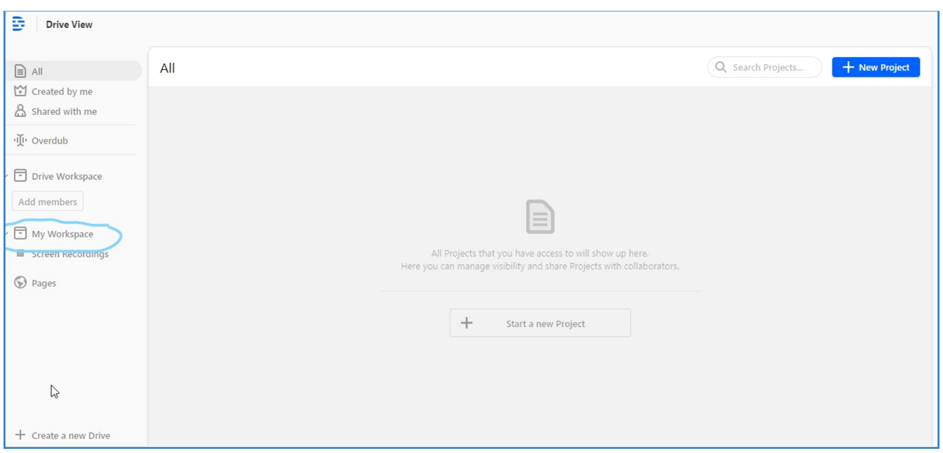
1. Verify that there is no transcription.

IF	THEN
An external company or individual recorded the pillar content such as a podcast, webinar, or interview.	Go to the web page where that video or audio lives to see if there is a transcription. Ask the external company or individual if they have transcribed the video or audio, with the Chief Executive Officer copied in the email.
The internal team has recorded the pillar content.	Check Basecamp, the Repurposing Tracker, Google Drive, or other places.

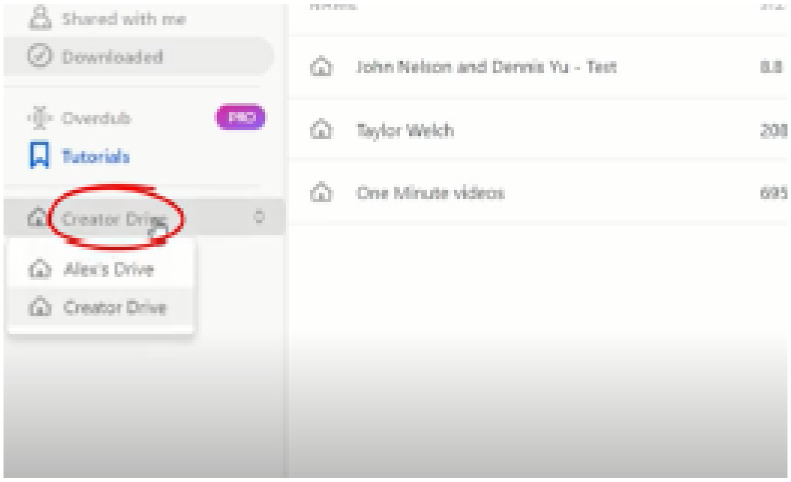
2. Sign in, install and open **Descript App**.

IF	THEN
You are an internal BlitzMetrics team member.	Contact an operations specialist, your team lead, an operations manager or a chief officer to obtain access to the gmail account of access@blitzmetrics.com.
You are not an internal BlitzMetrics team member.	Sign up to Descript.

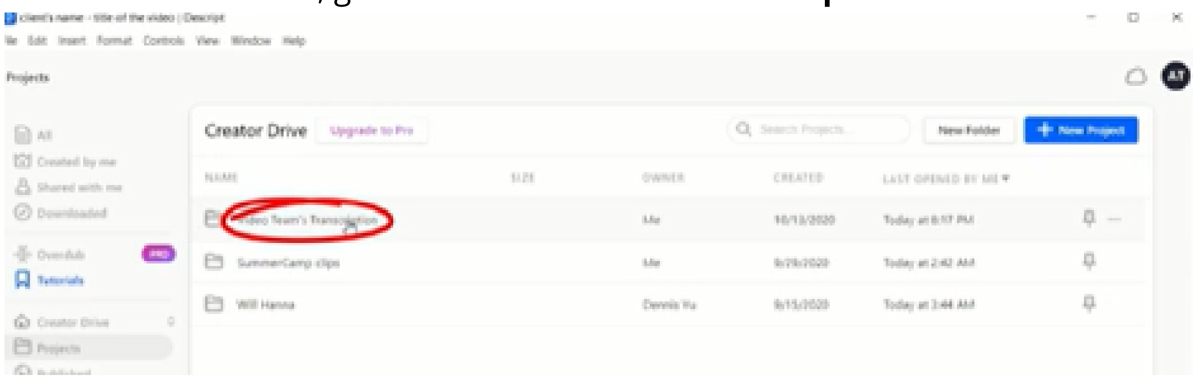
3. Go to My Workspace and click Screen Recordings



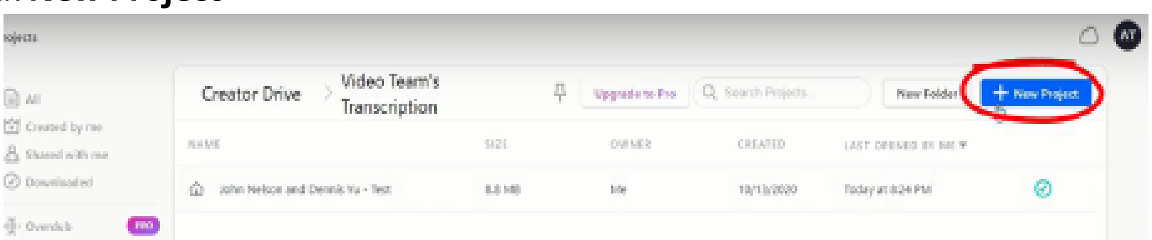
4. Verify that you're under the **Creator Drive**



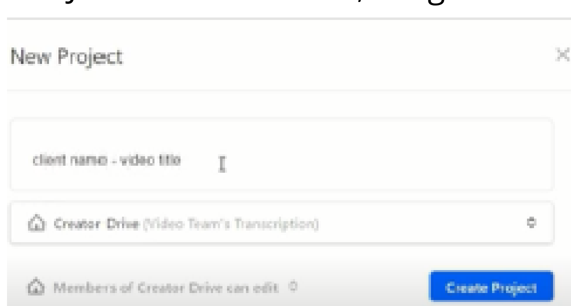
5. Under **Creator Drive**, go to the **Video Team's Transcription** folder.



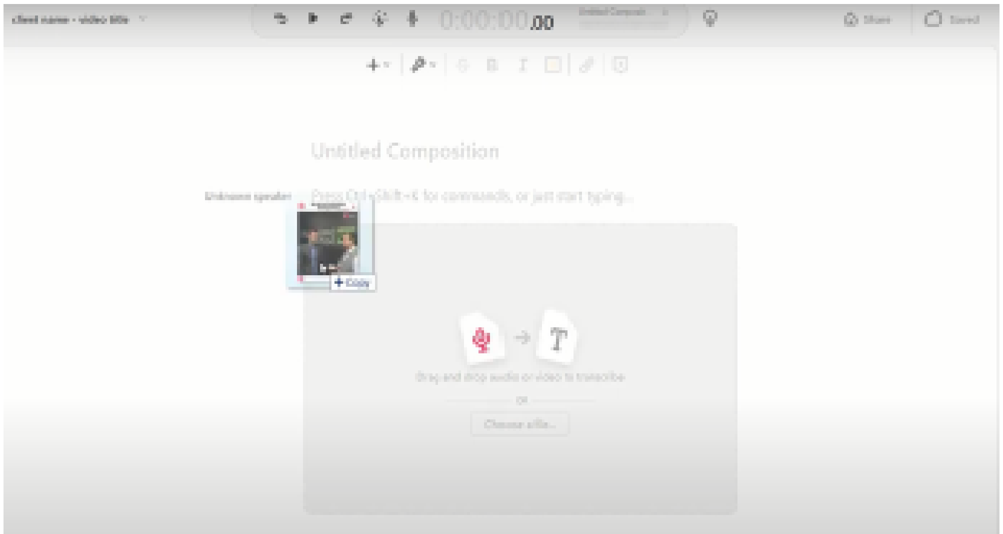
6. Click **New Project**



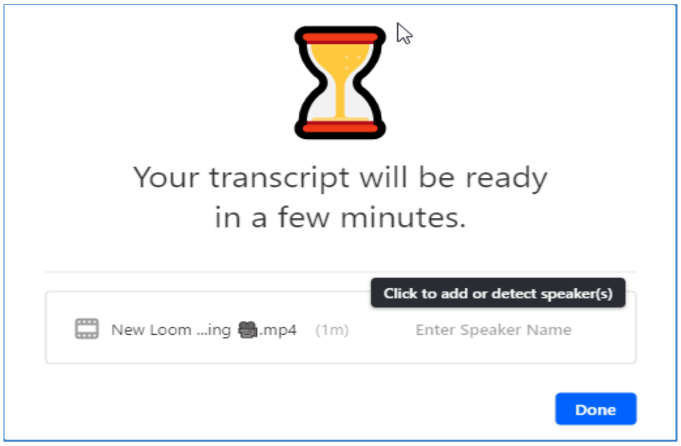
7. Name the file under the **client's name** and **video title,** (e.g. Conan O'brien - Caring For Your Pompadour, Aisa Jones - Dirt On Trial, Greg Perez - The Watcher).



8. To get started, **drag** an audio or video file into a **Blank Composition.**

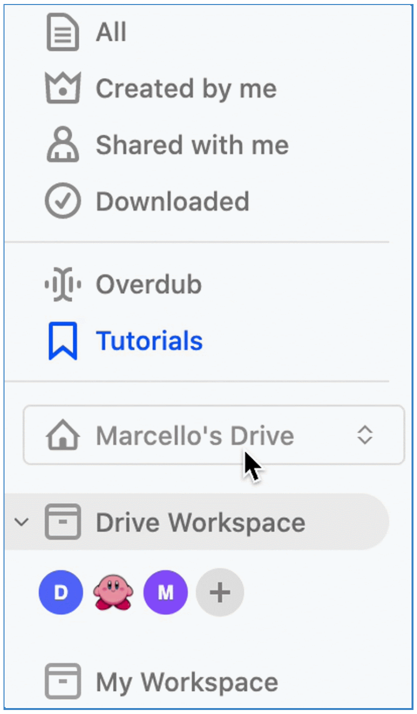


9. Wait for Descript to transcribe the file.



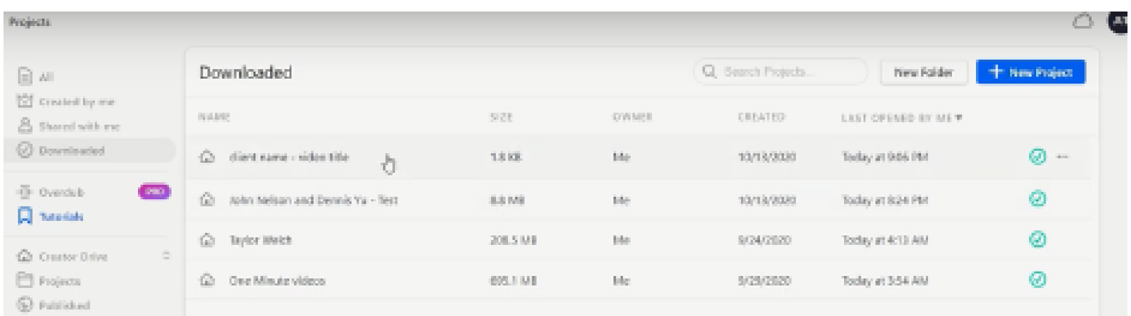
If you are in a situation where Descript has run out of transcription time or hours, try the following methods:

Method 1: Change your currently selected drive in the Drive View.
Go to (File > Open Drive View), click the drive selector dropdown on the left-hand sidebar. This will display folders and projects from within that drive. Choose Overdub Drive.

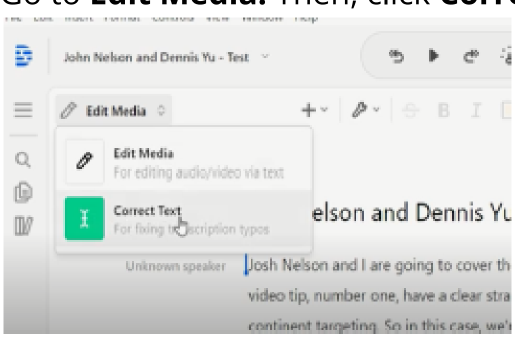


Method 2: Keep transcribing, and your extra hours will be billed at a rate of $2 per hour. Inform your team lead and the Director of Operations, or Operations Manager that Descript has run out of transcription time. Continue transcribing even WITHOUT approval.

10. Go to **Downloaded** and click the audio or video file.



11. Go to **Edit Media.** Then, click **Correct Text** .



12. Once everything is corrected, go to **File**. Then, click **Export**.

How To Write An Article About Pillar Content (Long-form Video)

1. **Write the draft article using the transcription.**

Make sure you have at least 200 words and take screenshots that show what you're trying to convey. Placing a red box around important numbers is the best way to draw a reader's attention.

Write succinctly. Break up long paragraphs for easier reading. Be clear and concise. Start with the numbers or Metrics. Give it context by telling the story behind them, then make recommendations that form a strategy as to what they can do to improve.

For content ideas, paid services such as FancyHands and Fiverr are great resources to use. The turnaround time was a few hours and the cost was just under $3 since we have a package of 50 tasks for $130 a month. The service is limited to US customers. You can sign up at *www.fancyhands.com*.

You should also reach out to the authors of the blog you've been commenting on, asking them for a few quotes on your topic. Attribute their quote, add their photo/headshot, and link to their website.

Make sure to let them know the article is live via their Twitter or Facebook page so others who follow them can benefit from their insights as well (and get a little traffic/awareness to your blog).

2. **Include interesting pictures and links to other articles to support the content. DO NOT use stock images or ones lifted from Google Images.**

3. **Proofread/Use An Editing Service to Tighten Up Your Article**

Glance over your article, looking for any typos and capitalization errors. Use a spelling/grammar checker app (e.g., Grammarly) on the whole article. Trim out adjective overuse and watch out for phrases that inflate your article needlessly like "However", "On the other hand", "Meanwhile", "The fact that", and "Actually".

Always write using an active voice, not passive. A passive voice is where you promote an action as the subject of a line. For example, "I wrote this article" is active. "This article was written by me" is passive and pointlessly bloated.

Break up your article into chunks by hitting enter every 3-5 lines. This makes reading easier. That's how this course is structured.

Editing services such as *www.draftin.com* have professional editors who will edit your writing for a small fee. They'll help you with the issues above, trim down your article, and avoid other issues, such as **Alliteration**, which is a string of words sharing the same first letter (e.g., "Peter Piper picked a pair of pickled peppers"). Break them up or use a thesaurus. Other examples are:

- **Don't end on prepositions,** or "linking" words like "with", "beneath", "on", "during", etc.
- **Stomp out weasel words.** For example, "Some people say" is dubious since it's not clear how many people said it.
- **Don't ask rhetorical questions** because who likes those?
- **Stay specific** and write succinctly.
- **Exaggerations** make your articles a billion times longer and add ambiguity.
- **Comparisons are messy**, like eating a box of chocolates left in the sun.
- If you're short on money and/or time, ask a few friends to look it over following the above guidelines. Remember these 3 C's for editing: Write consistently, concisely, and structure cleanly.

4. Link to Thought-Provoking Content with Relevant Anchor Text

An Anchor Text is the text that appears highlighted in a hypertext link and that can be clicked to open the target web page.

When researching your topic, keep a list of articles that can sprinkle into your final work. These links are usually from blogs you've had contact with or contributed to.

When linking, make sure to avoid using "Click Here!" anchor text. Instead, use text that portrays what the link is about, like *why you shouldn't steal your competitors' traffic*.

Don't over-promote yourself, otherwise you'll be labelled as a spammer. It's fine to have a URL in every paragraph or subtopic to drive your point home, but absolutely NO affiliate links or blatant for-profit material.

5. Dress Up Your Article with Formatting and Summarize Key Points

Adding small flourishes to your content helps readers retain key points more easily. **Bold key statements**, *"italicize quotes from others"*, and take advantage of headlines to break your article into sections. Recap major points at the end.

Remember:
- Bold key statements.
- Italicize quotes from others.
- Use headings and subheadings to break articles into sections.
- Reiterate major points at the very end of your article using bullet points, as we used in this list.

Finally, end with an invitation for your reader to respond. “What do you think?”, “Has this ever happened to you?”, “What should I do next?”. There are countless ways to spark a conversation, so try a few and let us know how it goes (Just like that!).

6. **Give Your Article A Snappy Title**

Once your article is done, it’s time to give it a killer headline that summarizes what your article is about and why your audience should read it.

It helps to lay out the numbers, what they mean, and how the reader benefits from them, such as “I have 602 Sales Reps Right Now Making Just Over $1 a Day” by Logan Young. Look over the following articles for some examples:
- *How to write headlines*
- *The Ultimate Idea-Inducing Creativity-Enhancing Sample Headline Collection*

7. **Categorize Your Post and Add Keywords**

Before you post your article, make sure you have it properly categorized. WordPress has a robust category system that allows you to keep what you’ve written about organized, so make sure to file each article under the appropriate section.

Keywords, (or “tags” as WordPress calls them) are special words you can reference in your article to help the search function categorize the post. These also help readers glance over the article list and see what it mentions, giving a small boost to the article’s SEO ranking as well.

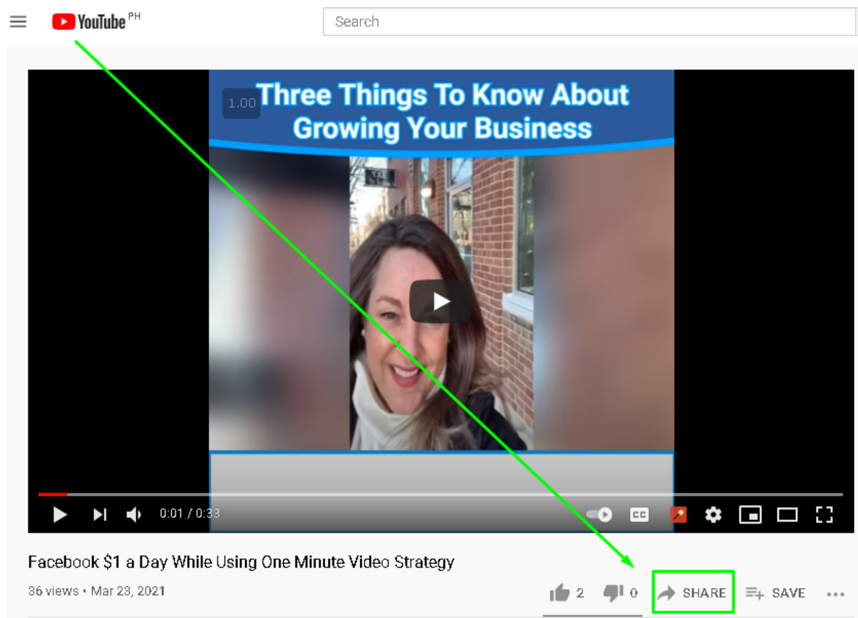
If you mention a proper noun in the article, chances are you can use it as a tag. For each topic, use up to five keyword tags to describe it.

How To Create A Webpage For Pillar Content (Long-form Video)

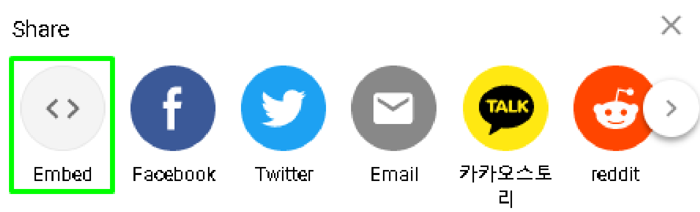
Video Guide: [Creating a Landing Page by Cloning Existing Page]()

1. Obtain the embed code from the video source.

   If the video source is YouTube, THEN



   i. Go to the video webpage.
   ii. Click "Share".
   iii. Click "Embed".



   iv. Click "Copy".

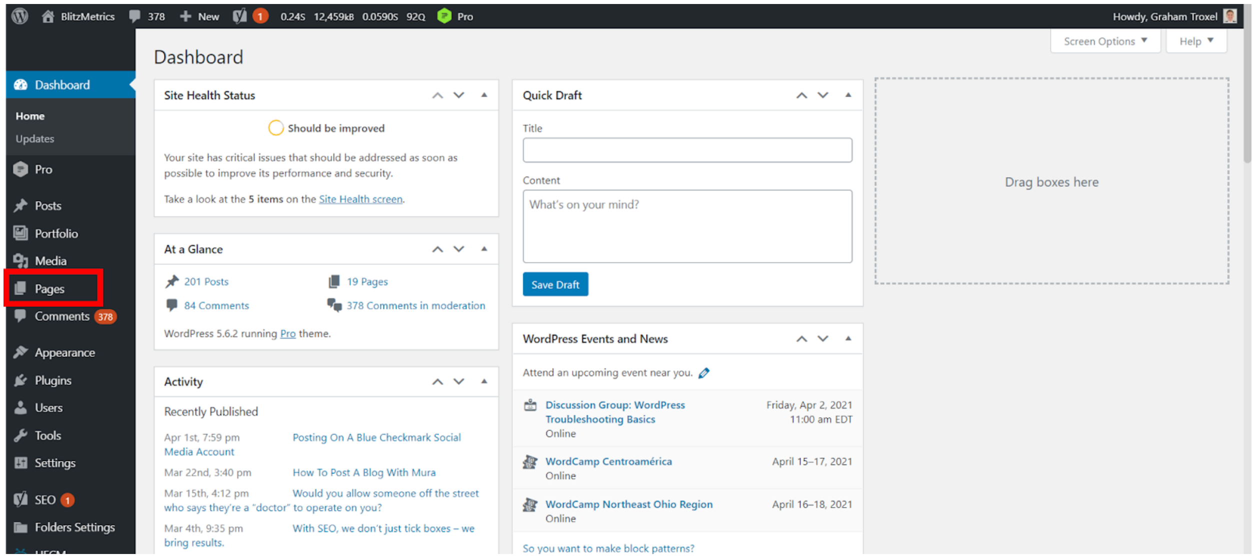
2. Login to the admin page of the website.

   If you do not have the URL to the website, contact the owner of the website.

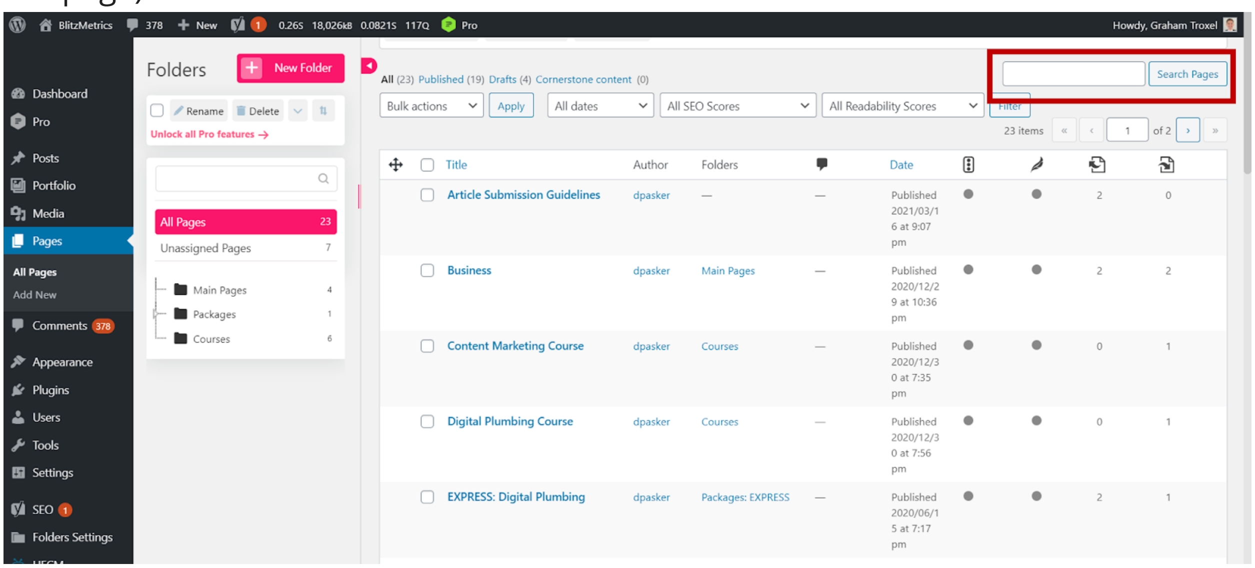
   Internally, as of April 2, 2021, the team members that can get you admin access are the following ([view Team Roster for contact info]()):

   i. Hezekiah Orteza.
   ii. Graham Troxel.
   iii. Daniel Pasker.

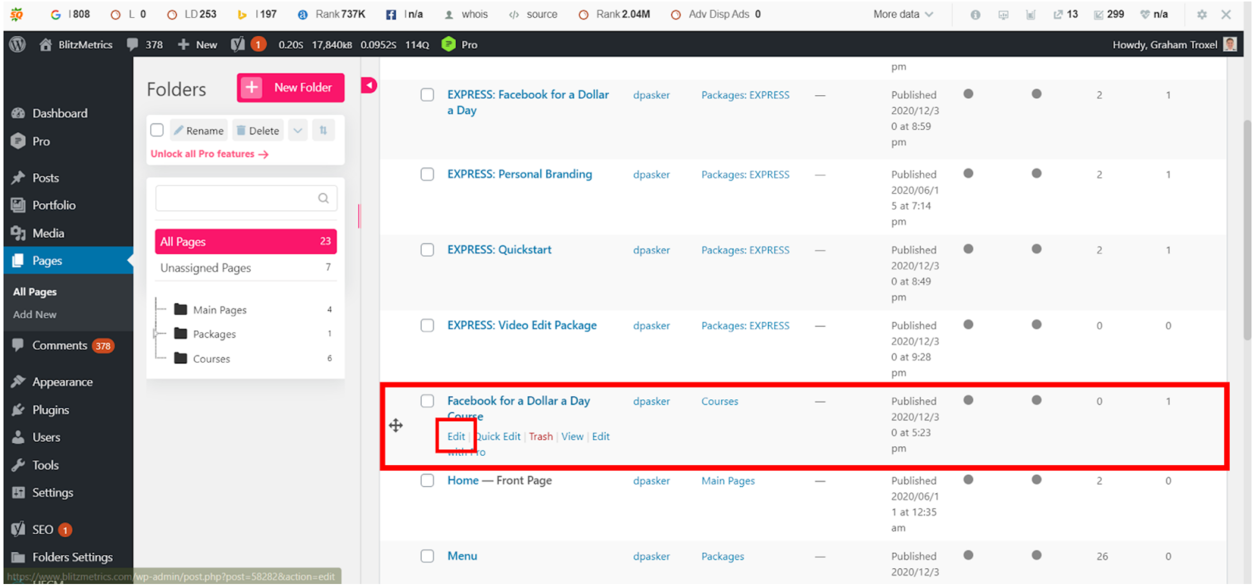
3. Navigate to the landing page you wish to modify. After logging on to the website, select the "Pages" button on the left sidebar.



4. Type the name of the webpage into the search bar (or scroll to the desired webpage).

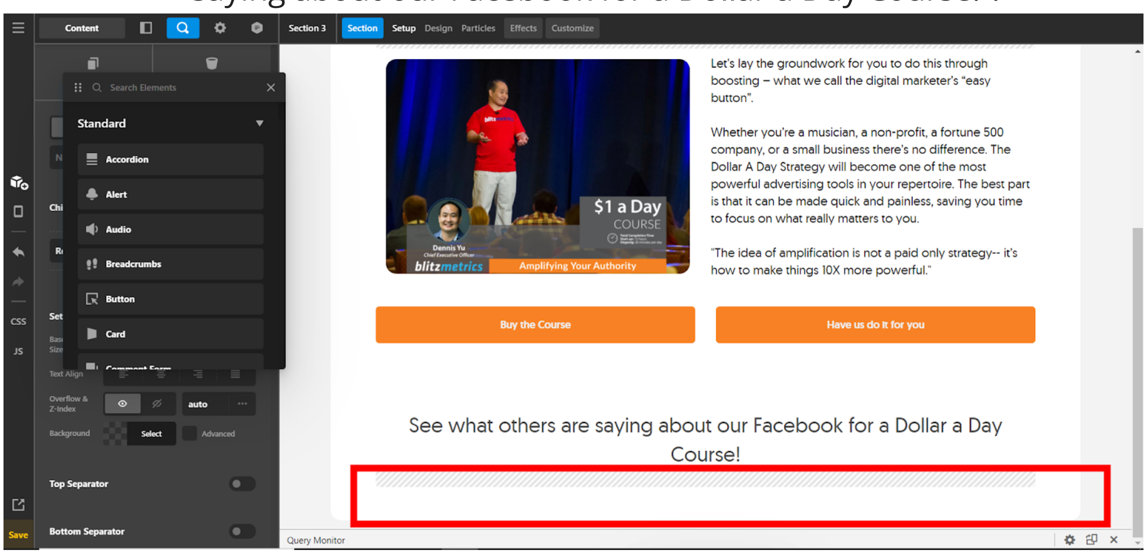


5. Hover over the webpage you wish to access and select “Edit”.

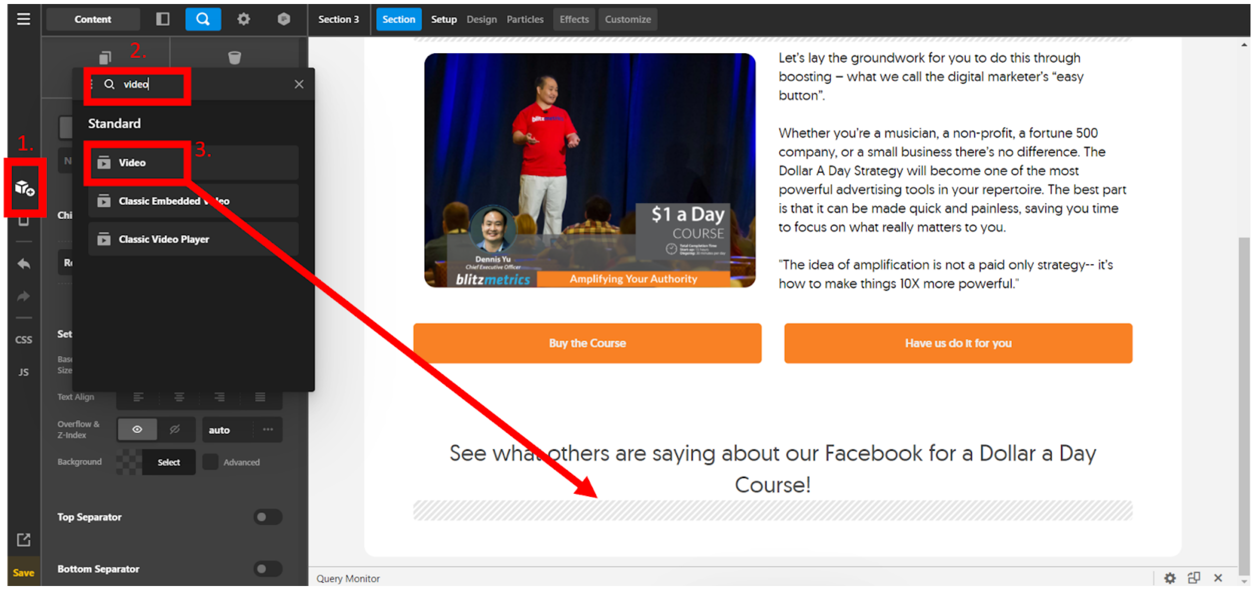


6. Insert a video element.
    i. Click anywhere where you want to embed the video.

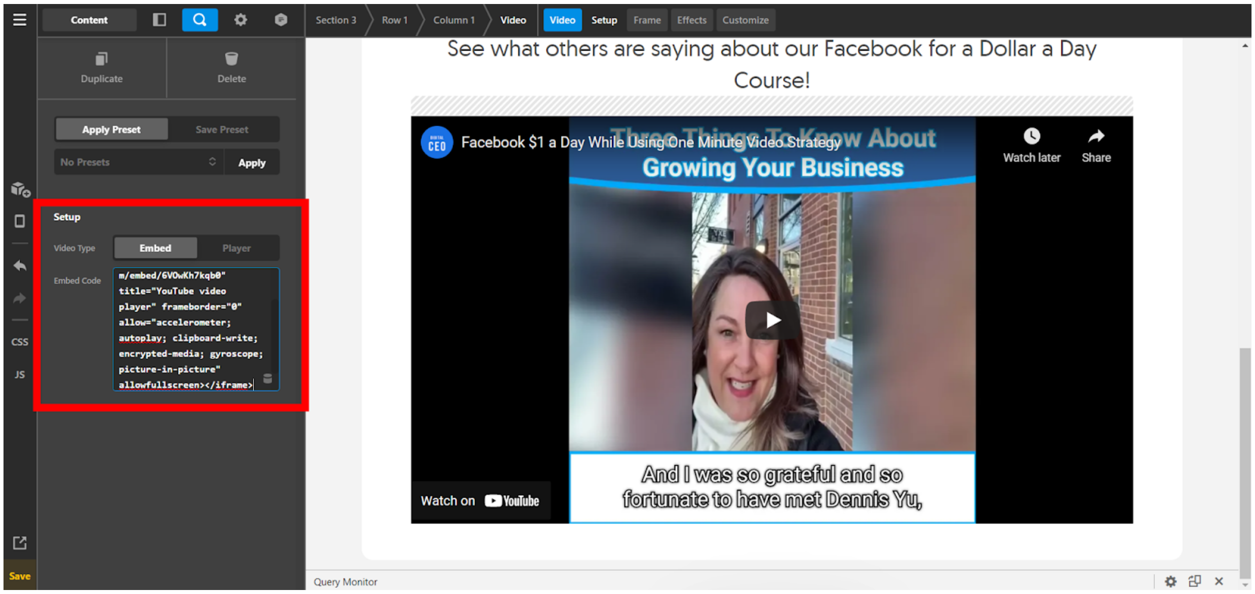
    In this case, we want to click underneath "See what others are saying about our Facebook for a Dollar a Day Course!".



    ii. Select the "Elements" button on the left sidebar.
    iii. Type "Video" in the search field.
    iv. Then drag the "Video" icon to the location you desire.

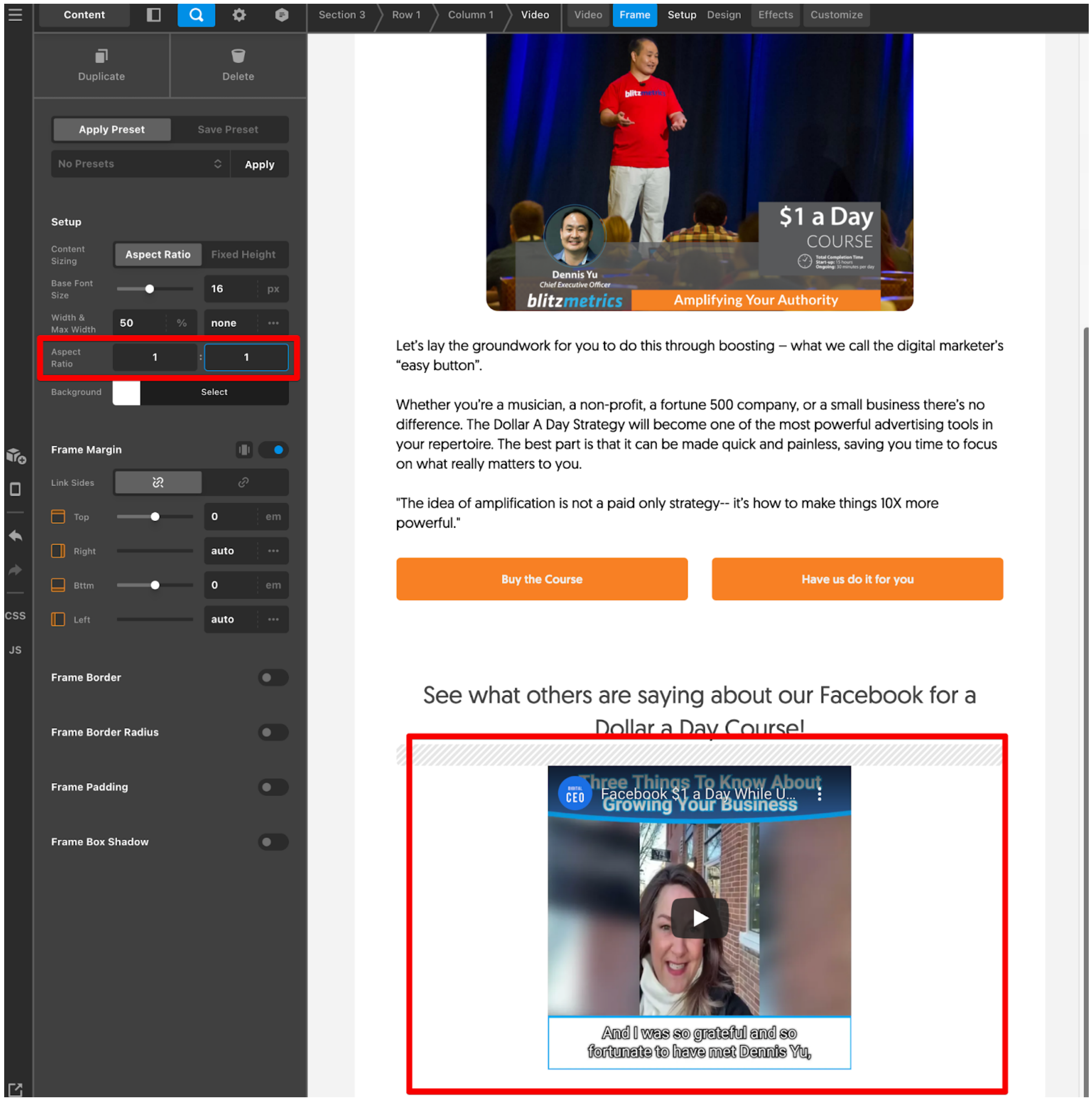

Content
Section 3
Section
Setup
Design
Particles
Effects
Customize
1.
2.
3.
video
Standard
Video
Classic Embedded Video
Classic Video Player
Let's lay the groundwork for you to do this through boosting – what we call the digital marketer's "easy button".
Whether you're a musician, a non-profit, a fortune 500 company, or a small business there's no difference. The Dollar A Day Strategy will become one of the most powerful advertising tools in your repertoire. The best part is that it can be made quick and painless, saving you time to focus on what really matters to you.
"The idea of amplification is not a paid only strategy-- it's how to make things 10X more powerful."
$1 a Day
COURSE
Dennis Yu
blitzmetrics
Amplifying Your Authority
Buy the Course
Have us do it for you
See what others are saying about our Facebook for a Dollar a Day Course!
Text Align
Overflow & Z-Index
auto
Background
Select
Advanced
Top Separator
Bottom Separator
CSS
JS
Save
Query Monitor

7. Embed code to video element by pasting the code into the appropriate box.

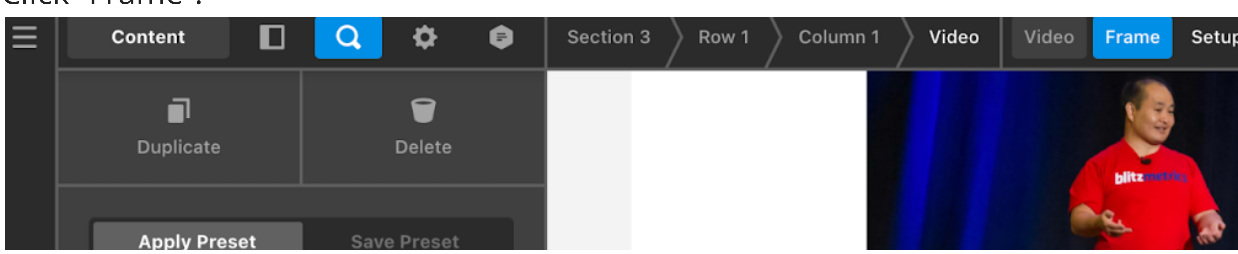


8. Set the proper aspect ratio.

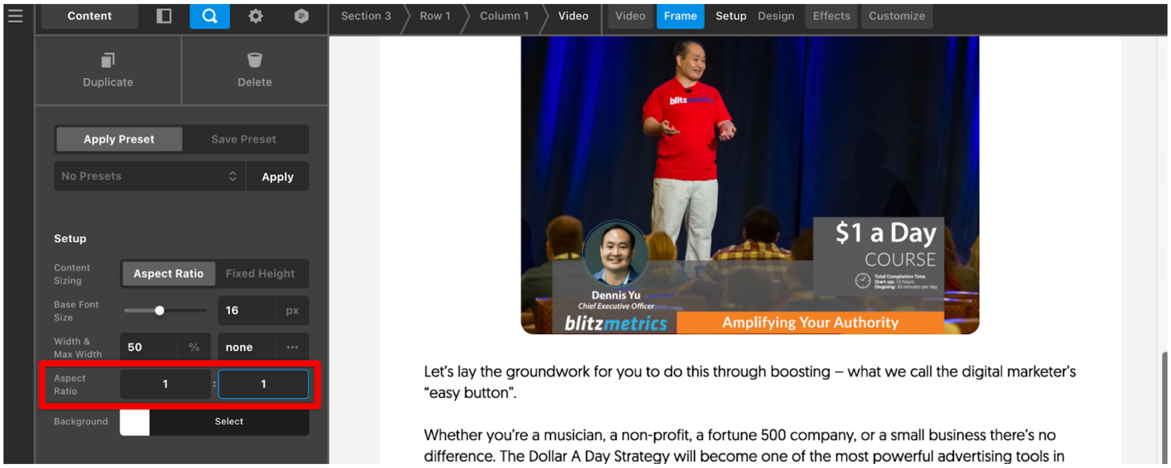
a. Select the video.



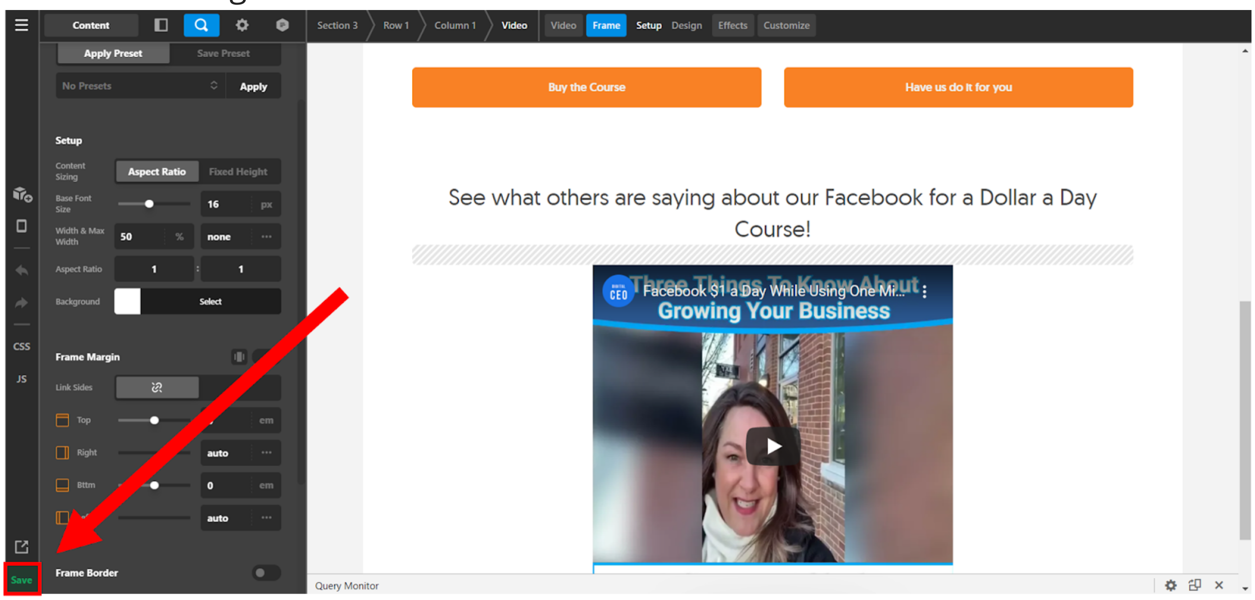
b. Click "Frame".



c. Set the aspect ratio.
   i. IF the video is vertical, THEN set aspect ratio to 9:16.
   ii. IF the video is square, THEN set aspect ratio to 1:1.
   iii. IF the video is horizontal, THEN set aspect ratio to 16:9.

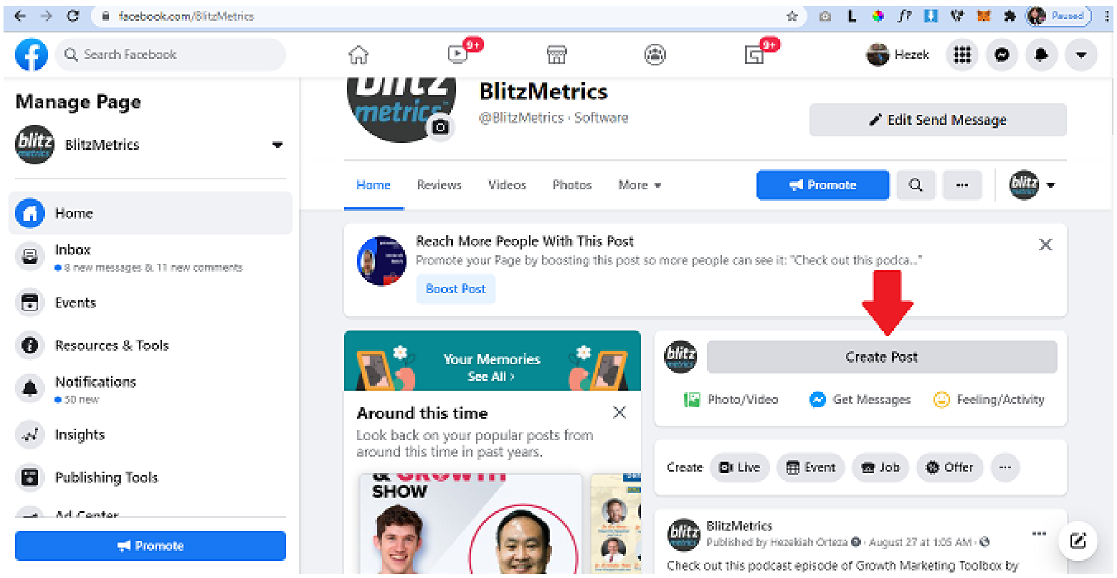


9. Click the green "Save" button in the lower left corner.

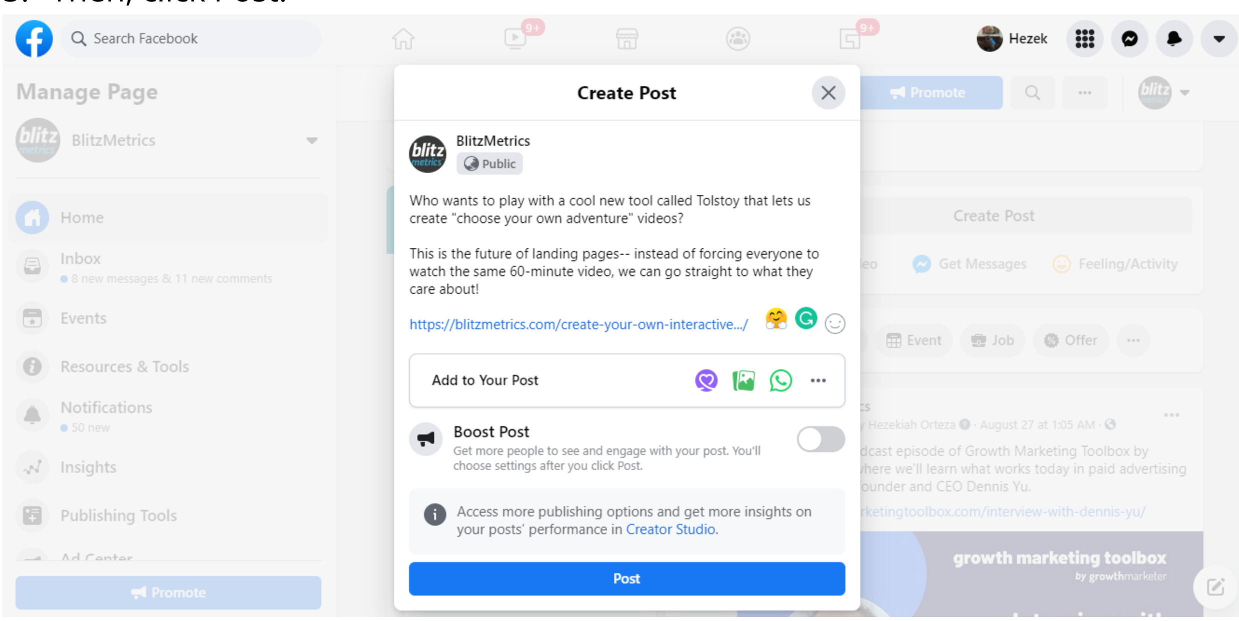


How To Crosspost An Article Or Blog Post On A Facebook Page, Profile, Or Group

1. Obtain Publish Content access to the facebook.com/BlitzMetrics by emailing access@blitzmetrics.com that you need this type of access.
2. Go to facebook.com/BlitzMetrics.
3. Click Create Post.

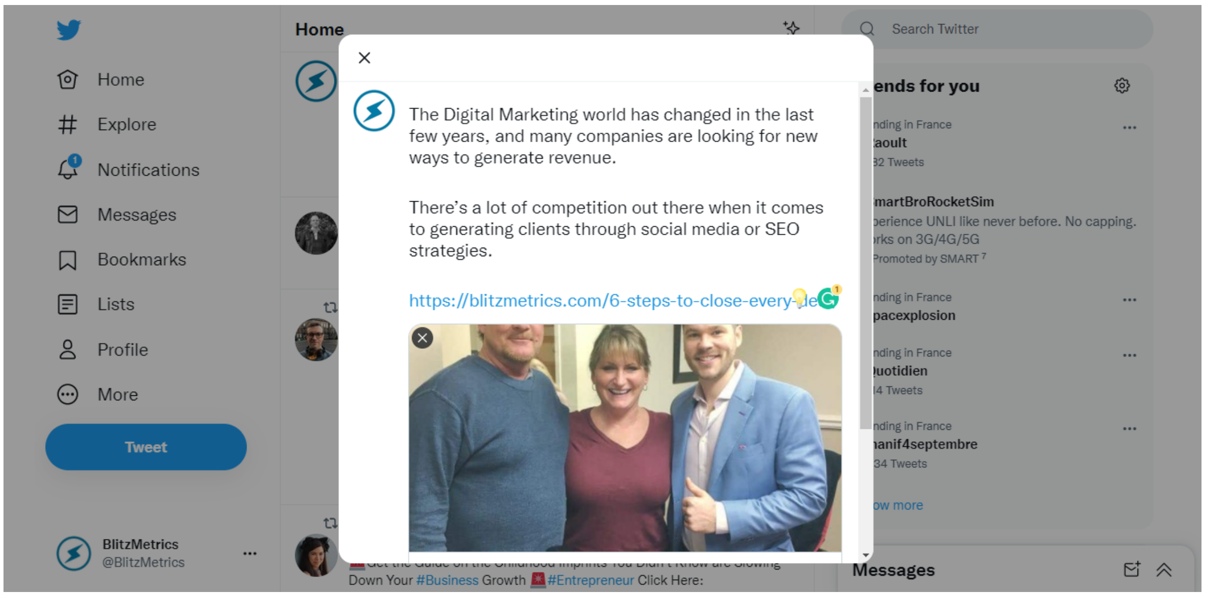


4. Upload the video, and paste the ready caption for the post. Make sure to adjust the spacing of sentences/paragraphs if needed.
5. Then, click Post.

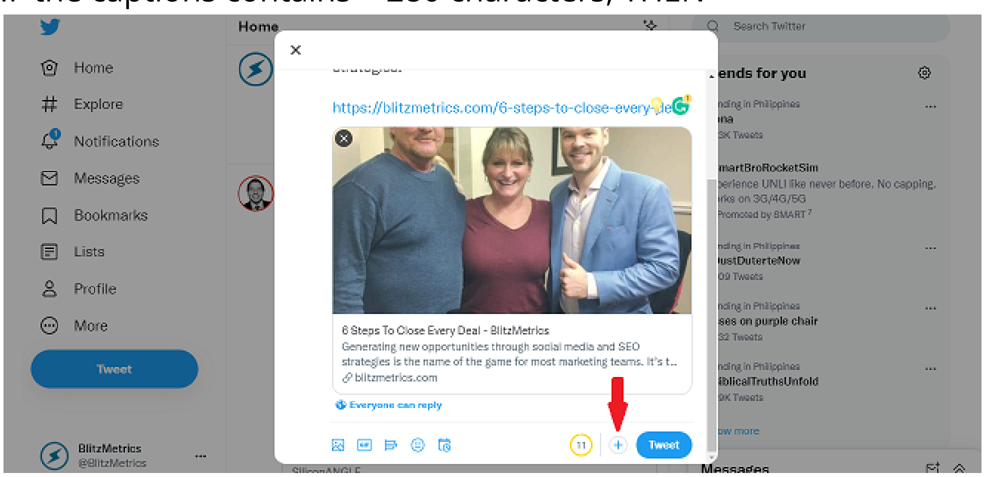


How To Crosspost An Article Or Blog Post Article On A Twitter Account

1. Email access@blitzmetrics.com that you must obtain the login credentials to the twitter.com/BlitzMetrics page along with why you need the login credentials.
2. Log in to twitter.com/BlitzMetrics.
3. Click Tweet.
4. Copy and paste the ready caption for the post including the link to the YouTube video. Make sure to adjust the spacing of sentences/paragraphs if needed.
5. Click Tweet.



   i. IF the captions contains > 280 characters, THEN

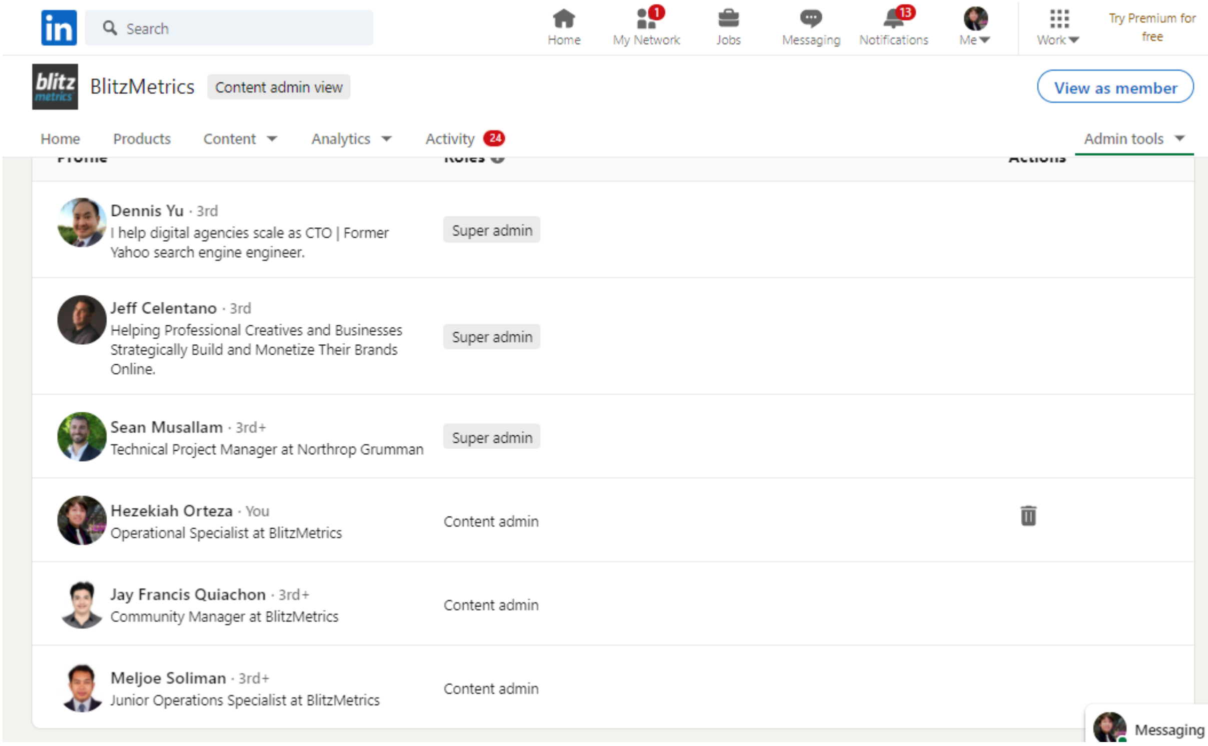


   ii. Open Twitter in another tab in your browser.
   iii. Write the second tweet.
   iv. Then, click the Tweet all button to publish.

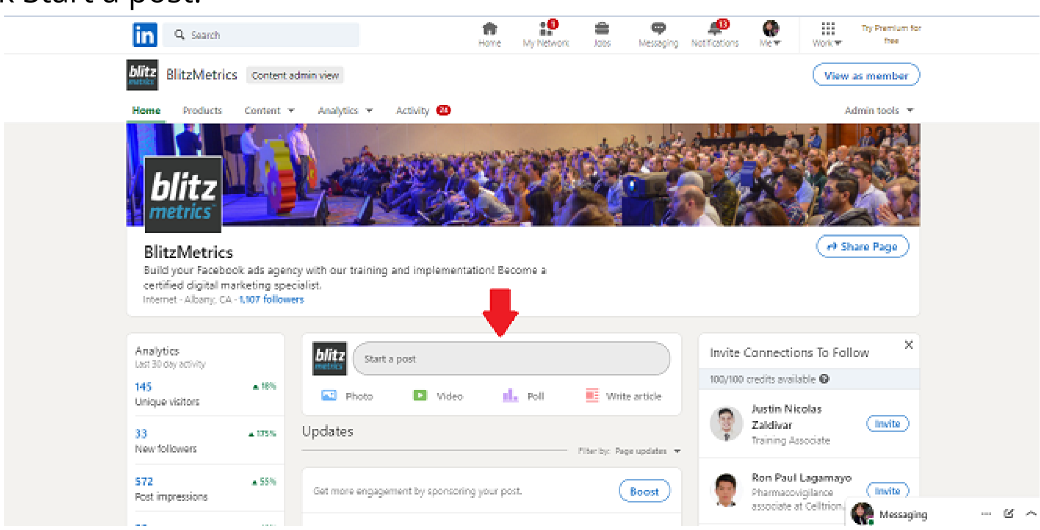
.

How To Crosspost An Article Or Blog Post Article On A LinkedIn Page

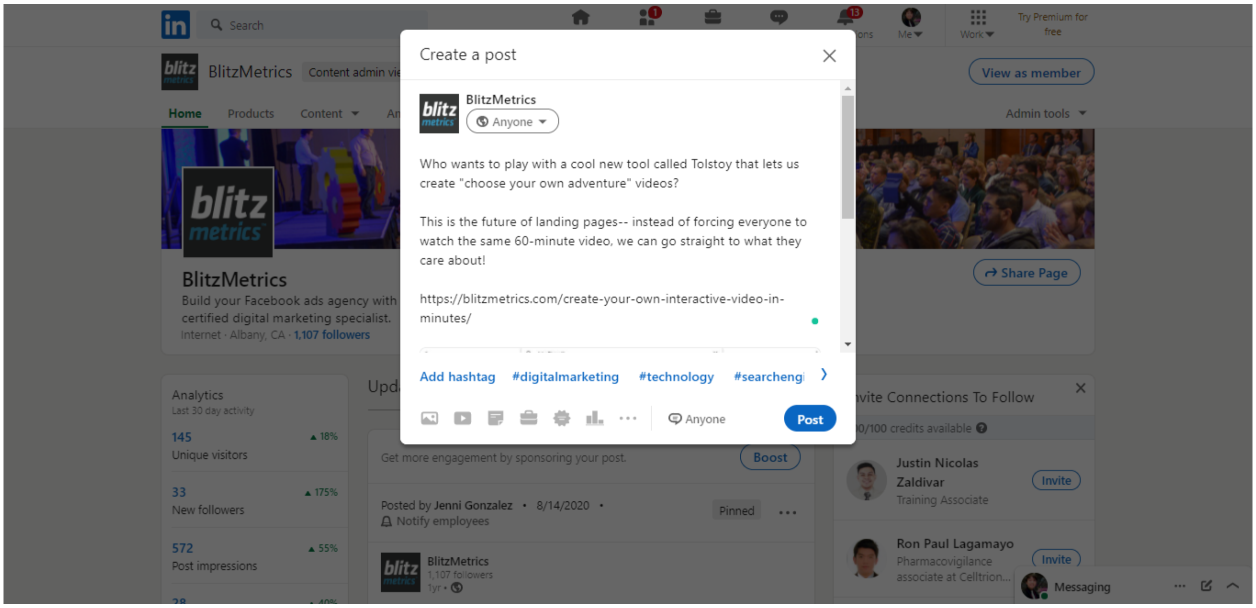
1. Email access@blitzmetrics.com that you must obtain Content Admin access to the [BlitzMetrics LinkedIn](#) page.



2. Go to the [BlitzMetrics LinkedIn](#) page.
3. Click Start a post.



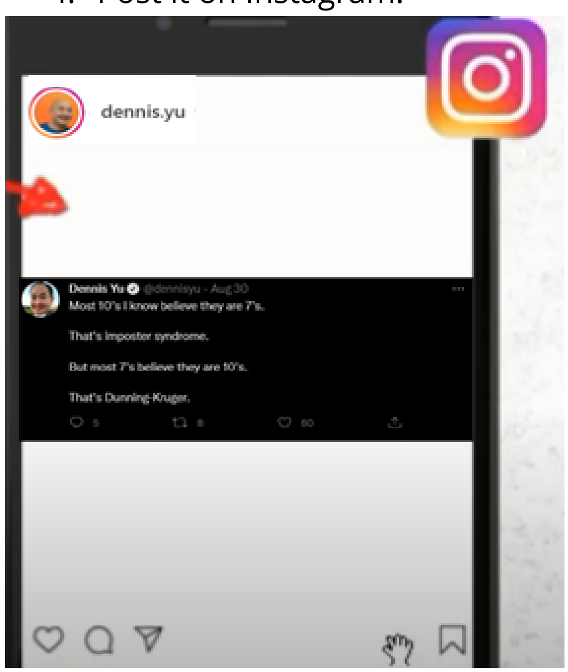
4. Upload the video, paste the ready caption for the post, adjusting the spacing of sentences/paragraphs if needed.
5. Click Post.


Create a post
BlitzMetrics
Anyone
Who wants to play with a cool new tool called Tolstoy that lets us create "choose your own adventure" videos?
This is the future of landing pages-- instead of forcing everyone to watch the same 60-minute video, we can go straight to what they care about!
https://blitzmetrics.com/create-your-own-interactive-video-in-minutes/
Add hashtag
#digitalmarketing
#technology
Anyone
Post
BlitzMetrics
View as member
Share Page
Analytics
145
Unique visitors
33
New followers
572
Post impressions
Boost
Posted by Jenni Gonzalez • 8/14/2020
Pinned
Justin Nicolas Zaldivar
Invite
Ron Paul Lagamayo
Invite
Messaging

How To Post In Instagram

1. Email access@blitzmetrics.com that you must obtain the login credentials to the BlitzMetrics Instagram page along with why you need the login credentials.
2. Log in to BlitzMetrics Instagram page.
   - ➢ Here are some ways that you can share, post, or add links on Instagram in order for your first content to go live.
   - ➢ **Referencing** the **platform** you're posting on helps make your content more **contextual** and **relevant**.
     a. Post a screenshot:
        1. Take a screenshot of your tweet.

        2. Then, use your smartphone's built-in photo editor.
        3. Erase/crop elements around the tweet.
        4. Post it on Instagram.



     b. Add a link:

1. Tap the plus sign at the top, then scroll to **Post** at the bottom.
   
2. Upload a photo from your media library.
3. Add a caption.
4. To add a link, be sure you shorten it. Use link-shortening services like Bitly or TinyUrl.
5. When you're done, tap Share.

How To Manage Public Figure Pages.

Initial Setup

Create and use a public figure page to boost your personal brand.

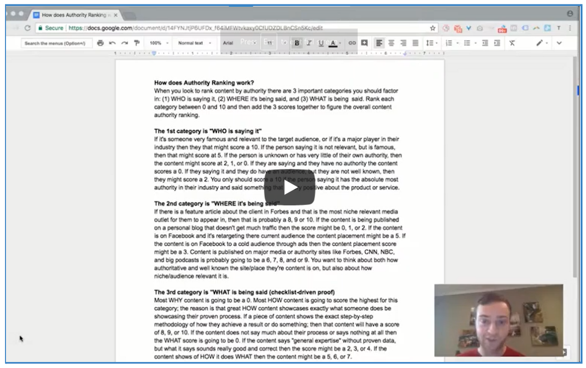
1. Understand the pre-reqs for building a page.
    a. Be willing to produce video.
    b. Have something to teach.
    c. Have a long-term mindset.
2. Get the same profile picture across all platforms.
3. Go to Facebook Page Creator and start creating your page.
4. Connect to Business Manager.
5. Create a Facebook ad account.
6. Start boosting posts on Facebook using your Ad account.
7. Plumbing- Set up tracking.
8. Content: What to post.

On-going Page Maintenance

1. Inbox Management
    ➢ Light touches to keep nurturing the relationship.
2. Shares
    a. Go to Notifications.
    b. Go to Shares on the left-side Options List.
    c. Comment and Like on the shared Post “Thanks for sharing” or anything parallel to that.
4. Comments
    Read/Watch the Post
    ➢ Like/Love positive comments.
    ➢ Reply to positive comments with a “Thank You”.
    ➢ Hide negative comments.
    ➢ Block users that make persistent negative comments.
5. Likes/Reactions
    a. Click on the number of likes.
    b. Click “Invite to Like” for users who’ve engaged but haven’t liked the page yet.
    Note: Facebook has a limit of 500 invites a day or you’ll get blocked.
6. Reporting in Basecamp
    ➢ Public Figures Basecamp thread.
    ➢ What you did.
    ➢ How long it took you?
    ➢ Date?
7. Update Content Library

How To Score Authority

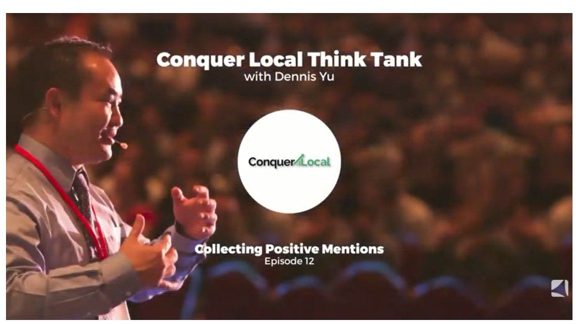
Most people don't know how to build authority, how to score authority, or even what it is. In this chapter, we will show you how to score authority.



[How to rank content out of 30 by authority v1 2018 0720]

[Conquer Local Think Tank | With Dennis Yu | Episode 13 Building and Scoring Authority]

[How To Score Authority - Mastermind]



[Conquer Local Think Tank | With Dennis Yu | Episode 12 Collecting Positive Mentions]

How To Upload A RAW Video On A YouTube Channel

1. Upload unedited videos to YouTube channel using the following title naming convention:
   RAW - **[Title / Interview Subject]** - **[Topic]** - **[YYYY / MM / DD]**
2. If the video has **client material**, such as a power hour, label it as INTERNAL and do not share with the public.
3. Under video description.
   a. Tag the video based on topic / category (e.g., #LDT, #CCS, 9 Triangles, etc.)
   b. Be as descriptive as possible, so that other editors can read the description and immediately understand the context of the video (what event it was filmed at, what content is covered, any standout moments, etc.) - this again, buys the editor a lot of time back in during the editing phase.
   c. Optional: include the video's #GCT in the description (E.g. #LDT, Personal Branding).

      Logan teaching at Phoenix SuperFragilistic Growth Marketers Meeting
      Goals: Showcase a behind-the-curtain snippet of one of our paid workshops.
      Content: Social Amplification Engine, Facebook $1 A Day.
      Targeting: Social media marketers, Small business owners, Members of XYZ Meetup-types.
4. Update the Content Library "Current Videos" tab Link for Blitz Content Library. Don't forget that we update the **video library** and **content library** at the same time.

5. Take each item and see it through the progression,-- then start on the next item.

This is way more efficient, but requires you to think carefully about the content (to focus on it, understand it and find ways to improve each item), instead of being a robot adding numbers in front of titles.

We want to ensure every video is tagged appropriately. We need them transcribed and turned into an article, as well as get one-minute snippets/summaries.

How To Update the Content Library.

Workflow [IMPORTANT]:

[How to Update Content Library]

Spreadsheet Template:

Enterprise: [Content Library Template]

ChiroRevenue or Chiropractors: [TEMPLATE Chirorevenue Content Library]

Overview:

[Brief Overview]

[The Content Library For Chiros -- Simplified]

Steps:

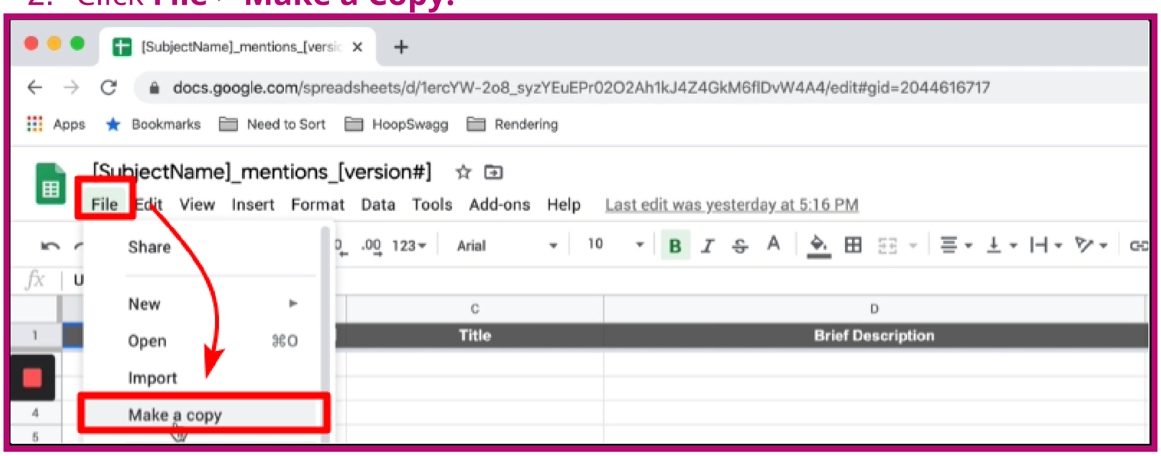
- [ ] **1. Set Up the Content Library Spreadsheet**
- [ ] **2. Update “Video Library” Sheet.**
- [ ] **3. Update “Facebook Content” Sheet.**
- [ ] **4. Update “Articles” Sheet.**

Video: *https://www.loom.com/share/e5ed532e04684646bc2c8b91ddcdef07*

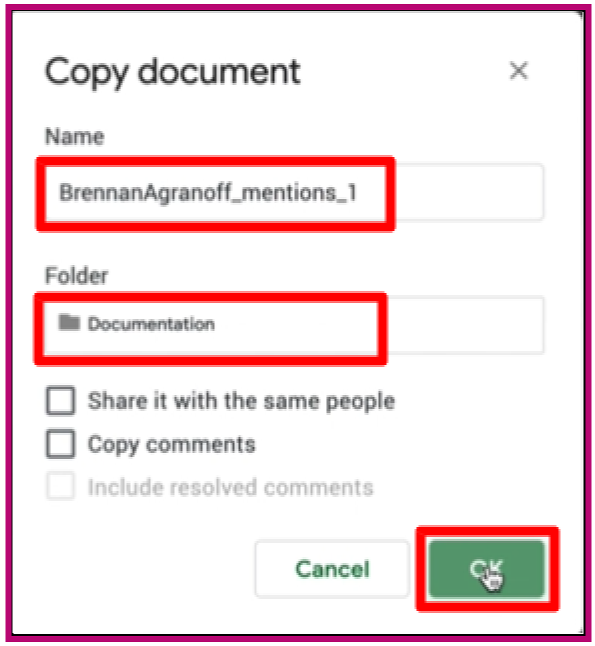
0. Set Up the “Content Library” Spreadsheet

Video: *https://www.loom.com/share/e5ed532e04684646bc2c8b91ddcdef07*

1. Open the Content Library spreadsheet in Google Sheets.
2. Click **File** > **Make a Copy.**

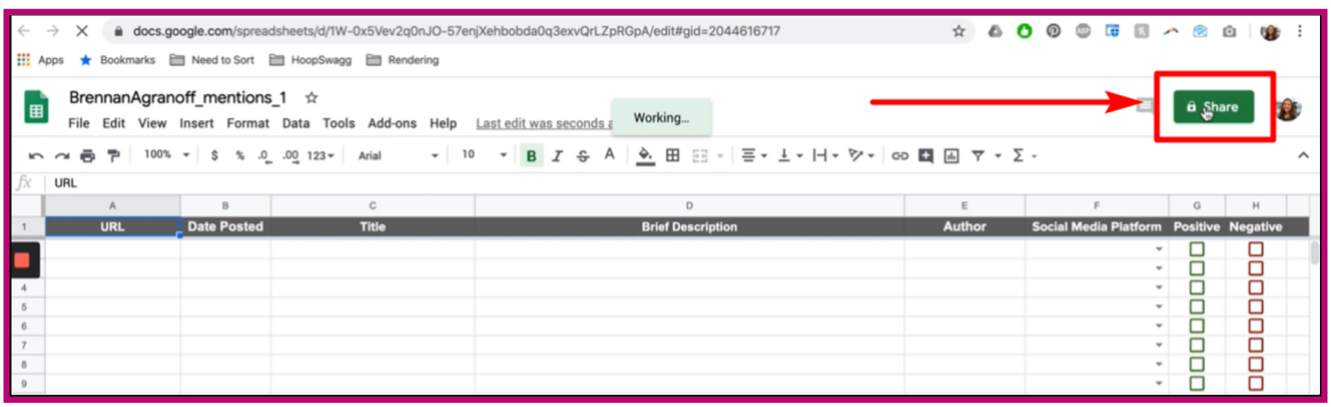


3. Rename the sheet using this format: <SubjectName>_mentions_<version#>. Select a location to save the file and click **OK**.



Note: *Version number depends on how many times a file is recreated. For this instance, the first version is BrennanAgranoff_mentions_1 and the second version of the same file would be named BrennanAgranoff_mentions_2*

4. Once the copy is made, share the file by clicking **Share** on the upper right.



5. On the **Share with others** window, enter the email address/es of the people you need to share the file to (which is also indicated in the document) and click the pencil icon on the right side to enable the '**Can edit'** option. Click **Send**.

1. Update "Video Library" Sheet

1.1. Search for the subject on

- 1.1.1. Google
- 1.1.2. Facebook
- 1.1.3. Instagram
- 1.1.4. LinkedIn
- 1.1.5. Twitter
- 1.1.6. YouTube

1.2. Scan videos for mentions of your subject

1.3. Check if the video is already in the spreadsheet

1.4. Add new videos to the "Video Library" sheet

- 1.4.1. Select **"Video Library"** tab
  - 1.4.1.1. In the **"Video Title"** column, add the title of the video
  - 1.4.1.2. In the **"URL"** column, add the URL of the video
  - 1.4.1.3. In the **"Duration"** column, add how long the video is in the format 0:00:00
    - 1.4.1.3.1. E.g. a 1 hour video would be marked as "1:00:00"
    - 1.4.1.3.2. E.g. a 2 minute and 30 second video would be marked as "0:02:30"
  - 1.4.1.4. In the **"Date Posted"** column, add the date the video was posted
  - 1.4.1.5. In the **"Notes"** column, add a short description of the video
  - 1.4.1.6. In the **"Type of Content"** column, indicate where you found the video
    - 1.4.1.6.1. E.g. Facebook Video
    - 1.4.1.6.2. E.g. IGTV

Video: *https://www.loom.com/share/4ab2c6e3fd4248c8971ae1ec638cf766*

2. Update "FB Content" Sheet

2.1. Search for the subject on Facebook
    2.1.1. Scan posts, videos, and photos for mentions of your subject
2.2. Check if the post is already in the spreadsheet
2.3. Add new content to the "FB Content" sheet
    2.3.1. Select **"FB Content"** tab
        2.3.1.1. In the **"Date"** column, add the date of the Facebook post
        2.3.1.2. In the **"Time"** column, add the time of the Facebook post
        2.3.1.3. In the **"Content"** column
            2.3.1.3.1. If the post has text
                2.3.1.3.1.1. Copy and paste the text from the Facebook post
            2.3.1.3.2. If the post does NOT have text
                2.3.1.3.2.1. Write a short description
        2.3.1.4. In the **"URL"** column, add the URL of the Facebook post
        2.3.1.5. In the **"Content Type"** column, select the type of post
            2.3.1.5.1. Post
            2.3.1.5.2. Photo
            2.3.1.5.3. Video
                2.3.1.5.3.1. Also add videos to the "Video Library" sheet

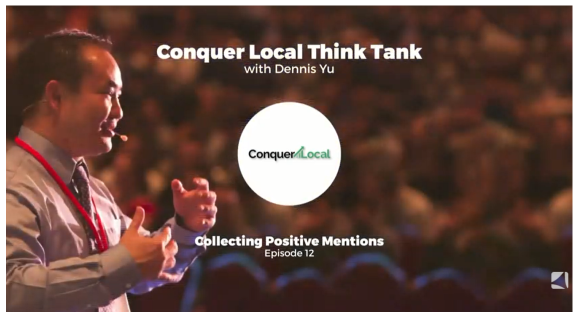
Video 1: *https://www.loom.com/share/246868df48474b2583aec1026a4b34d8*
Video 2: *https://www.loom.com/share/b87ceb0c47e443f4ae8d2a36573e6bcd*

3. Update "Articles" Sheet

3.1. Search for the subject
    3.1.1. Type subject's name in to Google
    3.1.2. Click the "News" tab
    3.1.3. Scan URLs & articles for mentions of your subject
3.2. Check if the article is already in the spreadsheet
3.3. Add new articles to the "Articles" sheet
    3.3.1. Select **"Articles"** tab
        3.3.1.1. In the **"Title"** column, add the title of the article
        3.3.1.2. In the **"URL"** column, add the URL of the article
        3.3.1.3. In the **"Site Name"** column, add where you found the article (E.g. Entrepreneur Magazine)
        3.3.1.4. In the **"Author(s)"** column, add the author of the article
        3.3.1.5. In the **"Date"** column, add the date the article was posted

How To Collect Positive Mentions

Kindly go to this website (https://blitzmetrics.com/positive-mentions/) and follow the detailed instructions about how to collect positive mentions on anyone across multiple channels.



[Conquer Local Think Tank | With Dennis Yu | Episode 12 Collecting Positive Mentions]

Please follow these directions in order to create a spreadsheet with articles that have positive notes about each location.

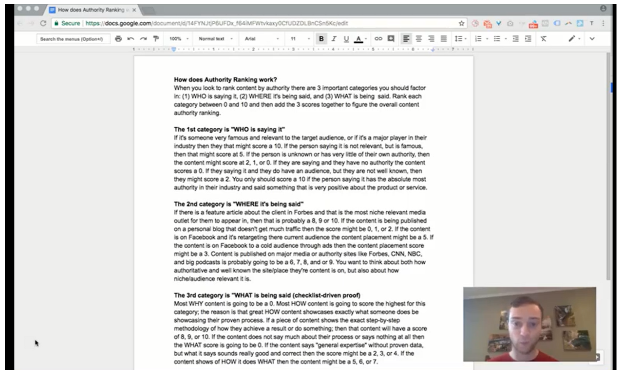
Place each in an individual sheet inside the spreadsheet.

How to store mentions:

- Create a spreadsheet. You can use Google Sheets, Microsoft Excel.
- Save the file using the syntax "[SubjectName]_mentions_[version#]", where you replace values within square brackets, "[" and "]".
- Make a 17-column table labeled: "URL", "Date", "Title", "Brief Description", "Author", "Social Media Platform", "Positive", "Negative", "Quote", "Actions to Take", "Action Completed?"
- You'll need to add in four columns for authority-- three to score each of the components and then a grand total column.

Include 4 columns after that for reviews. "Review Site", "Rating", "Description", and a final column for "Local Ranking". Collect reviews from Google, Yelp, Facebook and other review sites and then provide a total ranking based upon other local chiropractic offices in a 10 mile radius.

Here's a video on how to rank content by authority on a 30 point scale.



How does Authority Ranking work?
When you look to rank content by authority there are 3 important categories you should factor in: (1) WHO is saying it, (2) WHERE it's being said, and (3) WHAT is being said. Rank each category between 0 and 10 and then add the 3 scores together to figure the overall content authority ranking.

The 1st category is "WHO is saying it"
If it's someone very famous and relevant to the target audience, or if it's a major player in their industry then they that might score a 10. If the person saying it is not relevant, but is famous, then that might score at 5. If the person is unknown or has very little of their own authority, then the content might score at 2, 1, or 0. If they are saying and they have no authority the content scores a 0. If they saying it and they do have an audience, but they are not well known, then they might score a 2. You only should score a 10 if the person saying it has the absolute most authority in their industry and said something that is very positive about the product or service.

The 2nd category is "WHERE it's being said"
If there is a feature article about the client in Forbes and that is the most niche relevant media outlet for them to appear in, then that is probably a 8, 9 or 10. If the content is being published on a personal blog that doesn't get much traffic then the score might be 0, 1, or 2. If the content is on Facebook and it's retargeting there current audience the content placement might be a 5. If the content is on Facebook to a cold audience through ads then the content placement score might be a 3. Content is published on major media or authority sites like Forbes, CNN, NBC, and big podcasts is probably going to be a 6, 7, 8, and or 9. You want to think about both how authoritative and well known the site/place they're content is on, but also about how niche/audience relevant it is.

The 3rd category is "WHAT is being said (checklist-driven proof)
Most WHY content is going to be a 0. Most HOW content is going to score the highest for this category; the reason is that great HOW content showcases exactly what someone does be showcasing their proven process. If a piece of content shows the exact step-by-step methodology of how they achieve a result or do something; then that content will have a score of 8, 9, or 10. If the content does not say much about their process or says nothing at all then the WHAT score is going to be 0. If the content says "general expertise" without proven data, but what it says sounds really good and correct then the score might be a 2, 3, or 4. If the content shows of HOW it does WHAT then the content might be a 5, 6, or 7.

[How To Rank Content Out Of 30 By Authority]

When you find an article, podcast, or mention online, copy the link and paste into the URL column.

Add the following information:

- The date the article was posted
- It's title
- A brief description of what the article discusses
- The author of the article
- The social media platform where the article was discovered.
- Then add a checkmark in the "Positive" column or" Negative" column, depending on the content of the article/mention.
- If the article is positive, extract a quote and add it in the Quote column.

How to Find Mentions Online:

1. Type subject's name into Google
2. Click on the "News" tab
3. Scan URL's/articles for mentions of your subject
4. Might show articles for different people with the same name so make sure you pick the right one
5. Add the URL for your selected article into your spreadsheet, along with the other necessary column information

How to Find Mentions In Social Media:

Twitter

1. Click on the "Notifications" tab
2. Then click on the "Mentions" tab
3. Copy the URL to the excel document (along with other necessary column information

LinkedIn Public Figure Page

1. Click on the "Activity" tab
2. Click on the "Mentions" tab

3. Add to your spreadsheet, along with the other necessary column information

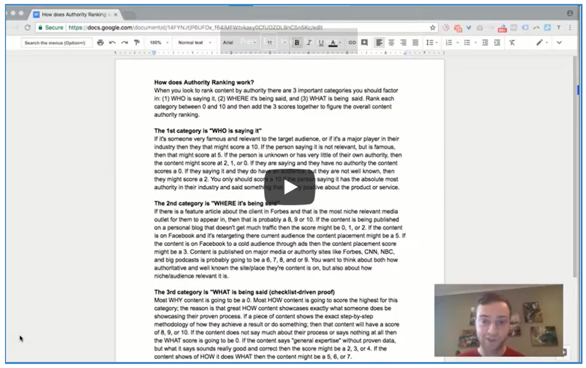
Facebook Public Figure Page

1. Click on the “Notifications” tab
2. Click on the “Activity” tab
3. Click on the “Mentions” tab
4. Add to your spreadsheet, along with other necessary column information

Same for Instagram

How To Score Content's Authority

Most people don't know how to build authority, how to score authority, or even what it is. In this chapter, we will show you how to score authority.



[How to rank content out of 30 by authority v1 2018 0720]

[Conquer Local Think Tank | With Dennis Yu | Episode 13 Building and Scoring Authority]

Graphic Designer Starter Guide

To be added.

Partner Manager Starter Guide

The Partner Manager is the VA equivalent of Account Manager. An Account Manager (not a VA) manages the relationship with **clients**-- largely through Zoom calls, texting, Basecamp updates, and lightweight touches (waiter that works with VA cooks in the restaurant). The Partner Manager helps with **non-clients,** which are largely potential business partners, speaking, events, podcasts, courses, and other means to jointly create traffic, content, and sales.

While the American Account Manager must have perfect English, culturally be in tune with clients, and operate in the same time zones as clients, a Partner Manager VA doesn't have to have perfect English or be working American time zones for their shift. We do require that our VA's work shifts overlapping time between American and VA schedules for coordination.

Required Roles of a Partner Manager

1. Community Manager.
    a. Truly care about client and customer success.
    b. Provide lightweight responses on Facebook, LinkedIn, blog, Twitter, etc.
    c. Monitor groups and social media for questions, comments, and complaints.
    d. Help users with basic questions-- sending them to relevant articles, videos, and courses.
    e. Escalate support questions, as necessary.
    f. Categorize content: Score by authority (30 point scale), categorize by topic, choose stage in Awareness, Consideration, and Conversion Funnel.
2. Content Manager.
    a. Not copywriting-- but cross-post items marked RTP (ready to post) to Facebook, YouTube, Twitter, and the blog for each client.
    b. A senior content VA can also boost any post for $1 a day for 7 days on Facebook to the client's primary audience (a pre-created audience anyone who is within 4-7 miles of the office).
    c. Higher Level Content VA to Posting - 50 photos and videos on GMB - 1 post per week on Facebook and Google
    d. Pull out worthwhile positive mentions (especially video responses) and place them in respective Content Library, tagged by partner and topic.
    e. Conduct lightweight analysis of ads metrics
3. Account Manager's Assistant.
    a. Onboard new clients in Basecamp.
    b. Audits client's access permissions on Facebook, Google, and others.
    c. Conducts Quick Audits.
    d. Create Snapshot Reports.

e. Assemble Executive Summary.
f. Assemble Success Tracker (Monthly or weekly report).
g. Organize, upload, and download files, and folders.
h. Gathering metrics from ads.
i. Order personalized gifts such as socks, shirts and stamps.

Digital Plumbing/Tracking Set-up

Digital Plumbing is the first phase of the 6-phase Social Amplification Engine. It is a requirement for most if not all client projects. A central requirement for the Digital Plumbing/Tracking Set-up VA is the ability to problem solve using the overall framework we use for tracking. Website variables, conversion pathways, and other factors make each project similar but unique. A successful Digital Plumbing VA will build a strong understanding of the framework and fundamentals of digital plumbing and will then use that knowledge to find solutions for each unique situation.

Digital plumbing is not only tracking on a website; it's all your data across all your channels. Not just pixels, but emails, custom audiences of all sorts, URL parameters, and so forth.

Tracking allows for remarketing to website visitors. Analyze which website visitors are buyers, build custom audiences, and run warm traffic through the 6 Phase Social Amplification Engine to convert.

The plumbing setup uses a central tool called Google Tag Manager (GTM). Although it's from Google, it is platform-independent and works with Facebook and other pixels (or tags). Tag management is a central piece of every company or website's online marketing.

The tool is used to easily manage all tracking pixels on a website (Facebook, Google Ads, Google Analytics, Yahoo!, etc.). GTM uses one container (=source code) on a website. The container then loads tags (=other code) based on triggers we define. Here is a brief intro to the Tag Manager by Google.

By setting up and installing GTM, we set the stage to create powerful marketing campaigns inside of Facebook and Google Ads. This speeds up the process of building marketing campaigns and reduces cost by eliminating the need to hire a developer to modify site code.

Plumbing also includes your email list, your social audiences, your app audiences, and any other data you have that we can tie together. With strong plumbing, we can push audiences between different channels to increase conversion rates.

A Digital Plumbing VA will execute the following tasks:

1. Preparation and Access Verification
2. Installing Google Tag Manager
3. Installing the Facebook Pixel
4. Basic Facebook Conversion Tracking
5. Installing the Google Ads Remarketing Tag
6. Basic Google Ads Conversion Tracking
7. Installing Universal Analytics
8. Basic Universal Analytics Goals
9. Installing Google Analytics 4
10. Basic Google Analytics 4 Events
11. Verifying Google Search Console
12. Linking Your Google Properties
13. Publish GTM Container and Tags to Website
14. Verify GTM Is Set up Correctly (fix errors if necessary)
15. Verify Data is Flowing Correctly (1 week after initial set-up)

Dashboard Engineer Starter Guide

To be added.

Course Feedback

We are constantly working to improve our courses. Take a moment to provide feedback on this course.

We appreciate your feedback and look forward to your growth with the BlitzMetrics team!

Send your Team Lead an email letting them know you've completed the training, confirm if you have access to the resources we shared, and last but not least ask for what's the next step.
We look forward to mentoring you along the way and helping you progress through the system!

COACHYU

Thank You!