

THE WORKFLOW WORKBOOK

Transforming Your Workflows from Hot-
Mess to Hyper-Efficient



L A U R A L E E



WELCOME, FRIEND!

Laura Lee Creative

I created this workbook to give you a comprehensive place for you to get more familiar with the workflows, systems, and templates you need to grow your business, without burning out.

Far too often (like literally ALL THE TIME) I see business owners struggling to run their business, get a normal amount of sleep, get organized, and streamline their processes and systems because they just think business has to be hard. I'm not sure if it's because people like to glorify busy in this day and age, or if they just simply don't realize there is a better, easier, **way faster** way to do nearly everything they're trying to do in their business.

I think most people think: It's supposed to be filled with sleepless nights and stress and constant overwhelm, right? Isn't that what we signed up for?

Let me shout this out: **HECK NO WE DIDN'T!**

We became our own boss because we wanted FREEDOM! Freedom to make our own schedules, to not have a cap on our income, to do work that lights us up, to serve clients who make our hearts pitter patter, and to have time to spend with the people we love the most. **We did NOT become our own boss to trade our 9-5 jobs for a 24/7 one, spend our days doing admin tasks that we think will take 5 minutes and magically take 13 hours, or feeling guilty when we take a gosh darn day off.**

So, then **WHY THE HECK DOES THIS HAPPEN?**

Because so many business owners run their business like a leaky bucket with duct tape covering the holes. They mask the problems in their business without figuring out how to fix it for good. Most business owners are losing clients, opportunities, money, time, and sanity because of their leaky buckets, and this workbook is the guide you've been missing to figure out how to plug those holes for GOOD.

So, let's get started!!!!

Laura Lee Creative

Oh, and PS. Hey, hi hello! I'm Laura - founder of Laura Lee Photography, Laura Lee Creative and Find Your Freedom. Yup - #multipassionate entrepreneur over here. I've been in business for 8 years+ as a wedding and brand photographer, and a business coach, and I get FIRED UP about helping business owners like YOU get their lives back. I'm obsessed with mountains, firepits, deep conversation, and a good glass of Riesling, and if you combined all of the above into one setting, I'd probably end up learning your whole life story and all your deepest dreams and desires for your life.

I care about your business because I care about your life. They go hand in hand and that's at the center of what I do: help business owners on their pursuit of freedom. Of less work, more life, more passion, and more doing what lights us up!! I cannot wait to hear how this workbook helps transform your business!!



A close-up photograph of an aloe vera plant, showing its thick, green, serrated leaves. The leaves are arranged in a rosette pattern, with some showing signs of aging or damage. The background is a soft, out-of-focus light gray.

YOUR

WORKFLOW FOUNDATION

10 Things Every Workflow Includes:

BACK END WORKFLOW COMPONENTS

1. Chapter Headings/Stages of Your Project
2. Tasks (within each stage)
3. Subtasks (within certain tasks)
4. Due Dates (based on previous step or project date)
5. Assignees (if you are delegating)

CLIENT FACING WORKFLOW COMPONENTS

1. Client Education (throughout each stage)
2. Email Communication (throughout each stage)
3. Questionnaires / Pricing Guides / Brochures / Quotes /
Client Guides
4. Client Gifts
5. Client Meetings During the Process

The background is a soft-focus photograph of a workspace. At the top, a green plant with long, thin leaves is visible. Below it, a pair of glasses with orange and black frames lies on a white surface. To the left, a white notebook with a dotted pattern is partially visible. At the bottom, an orange phone with a white polka-dot case is shown. A semi-transparent beige rectangle is centered over the image, containing the text.

PHASE 1

BUILD

Five Steps for Building Your Workflow Base:

1. Write Out Your Sections or Stages

The first step of creating your workflow is writing out each section of your workflow. Sections are not tasks, they're where your tasks, subtasks, emails etc. all exist throughout the different stages of your workflow. Examples of sections would be "The Inquiry Process", "Client Onboarding" or "Post Production for Wedding"

2. Fill in the Sections or Stages (With tasks, subtasks, emails, etc.)

Each Stage or Section would have multiple tasks and subtasks, emails, questionnaires, etc. Each of the 10 pieces of a workflow we went over above would be filled into each section. ***Not every section will have all 10 things though of course!***

3. Assign Due Dates

Once you have your workflow written out, you can go through and determine when each task, subtasks, email, questionnaire etc. needs to be completed! Your due dates can be based of three major things:

1. When a previous task is complete
2. When the workflow is activated
3. Before or After the Project Date

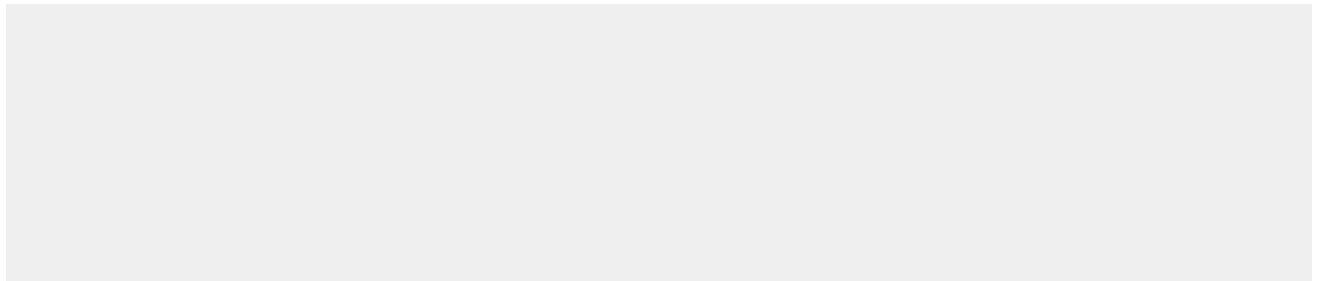
4. Determine who does what

Once you have a workflow in place, it becomes much easier to go through each step and see what you can outsource or delegate to someone on your team, or a subcontractor. When I first created my workflow, I color coded who I was going to outsource certain tasks to and when this happens in the process.

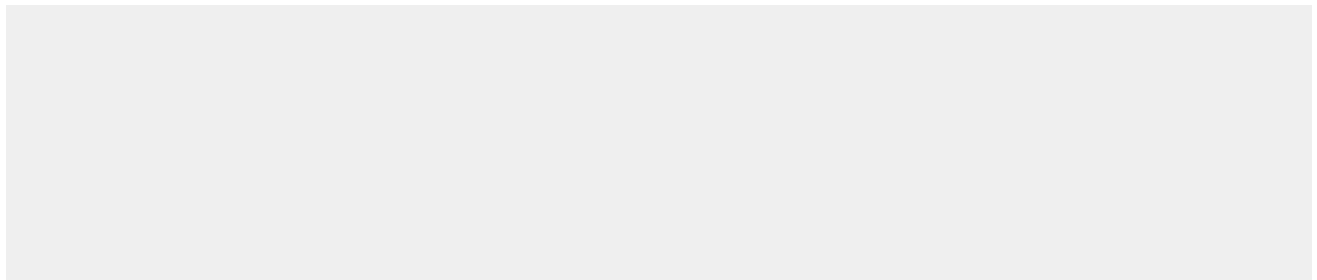
Ask yourself: On a scale of 1-5 how much do I love or hate this task? Is this task in my zone of genius, zone of competence or zone of incompetence? If it's not in the top 2, let's get rid of it. And if it's in your zone of competence, let's work towards outsourcing it as we grow our businesses.

Let's figure it out:

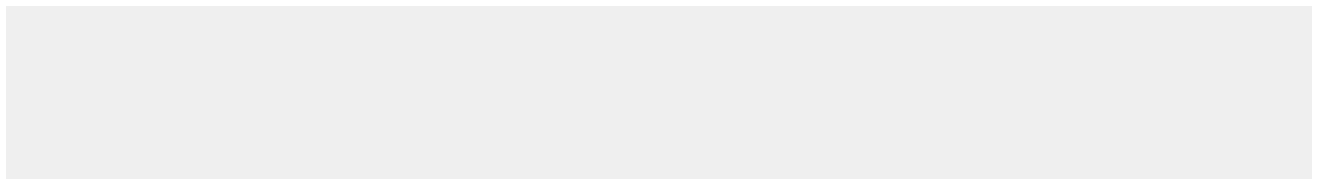
1. What tasks do you know you're not good at, that you procrastinate on, that you could hire out for? (Aka your Zone of Incompetence) (Examples: Bookkeeping, Accounting, Taxes, Album Design, Copywriting, Graphic Design, etc.)



2. What tasks are you pretty good at, but you don't NEED to be doing yourself because they don't directly result in income? In an ideal financial situation, these will be outsourced. Usually, these are the things taking up a HUGE portion of your time, without having a financial return. (Admin tasks, Website Design, SEO, Editing, Album Design, Blogging, etc.)



3. What tasks are in your zone of genius that directly result in clients or income that you cannot or will not outsource?



5.Determine Where You Can Add Value to Client Experience Throughout Each Stage

Gleaning what you know about marketing, where can you add client touch points in each section of your process to bring more value, better their experience, make a personal connection?

Let's figure it out:

1.Where can I add even better client touch points throughout each stage?

2. Where can I add good marketing with my clients?

3. Where can I surprise and delight my clients throughout the process of working together? How can I WOW them?

4. What questions can I answer proactively that will make their experience better?

5. What parts of the process do I have little communication with them that I can reach out and stay top of mind?



PHASE 2

STREAMLINE

Your Template and Systems Creation Checklist

- Templates to Create for Your CRM
 - Email Templates
 - Questionnaires
 - Brochures
 - Contracts-
 - Proposals
 - Invoices
 - Packages
- Create systems for:
 - Creating Timelines
 - Family Formal Lists
 - Collecting Vendor Info
 - Post Production
 - Blogging
 - Outsourcing
- Use apps to make your life easier for things like
 - Scheduling meetings
 - Tracking Mileage
 - Scheduling Social Media

Determine Where Tasks & Subtasks Can Be Made More Efficient

Now that you have the checklist foundation of your workflow, you can go through it to see where every task or subtasks can be made more efficient and streamlined. Here are some questions and tips to get you started on streamlining your workflow.

Let's figure it out:

1.What email templates do you need to create to serve your clients better, and make things easier for you?

2.What role would you want to hire out for on your team? Either as a part time person or a subcontractor? What tasks do you want to outsource?

3.What templates can you create other than emails to make your work go faster? (Blogging template, newsletter template, editing preset, etc.)

4.What softwares, or apps are you going to look into to make your life easier?

A person is sitting, holding a speckled ceramic coffee cup with both hands. They are wearing blue jeans and a white top. A large green plant is visible on the left side of the frame. A semi-transparent beige rectangle is centered over the image, containing the text 'PHASE 3' and 'AUTOMATE'.

PHASE 3

AUTOMATE

Automate + Input Workflow into CRM or Task Management System

Once you have your workflow designed (I suggest started in a google doc so you can fiddle with it and edit it a bunch until you're satisfied with it) then you can put it into a CRM such as HoneyBook, or a task management system such as Asana or Trello or Clickup (My preference is Clickup).

This allows you to Manage Multiple Clients and Projects Efficiently
I personally use HoneyBook, and since I have my workflows, email templates, questionnaires, and brochures all hosted on the platform, all I need to do is apply the proper workflow to each client, and it will give me a list of tasks for every day. This allows me to manage an average of 72 active projects at a time with ease without ever wondering what clients have tasks outstanding or falling through the cracks.

Click Here to Start a FREE
trial of Honeybook



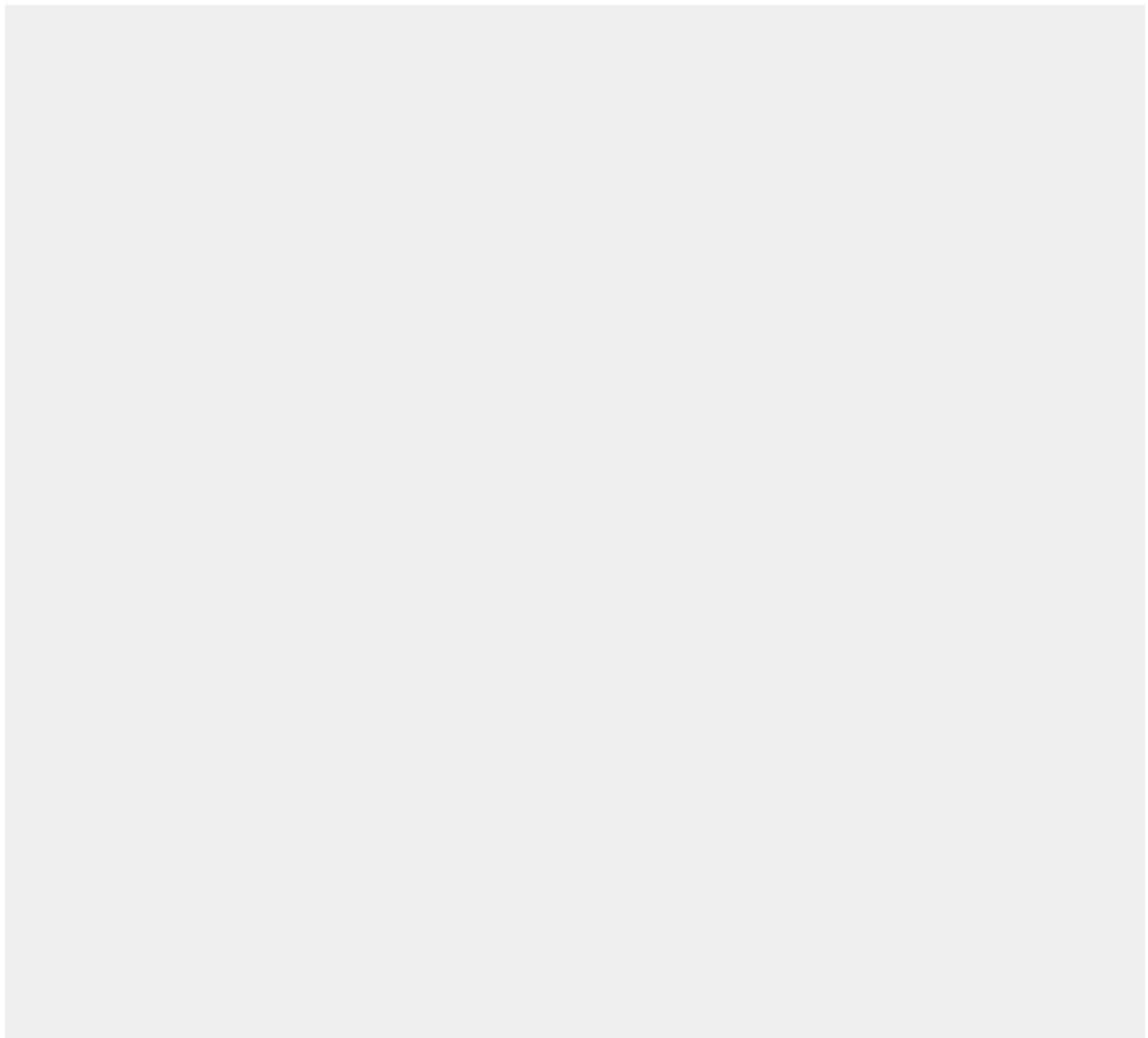
PHASE 4

SCALE

Write Your Procedure Manual

Once you have every step laid out in your workflow, if you're getting ready to hire on a team member, independent contractor, associate, or even an intern, I recommend writing out the exact process for every single step in your workflow of EXACTLY how that task is done. It'll allow you to completely step away from certain tasks in your business.

What parts of your business do you want to write processes for?





**READY TO JOIN ME
INSIDE PHOTOGRAPHY
WORKFLOW MASTERY?**

[CLICK HERE TO GET STARTED TODAY!](#)

PHEW! That's a wrap!

Thank you so much for downloading this guide and helping me help you! It is my hope that it will transform your business into a streamlined, well-oiled machine. I hope to continue helping you along your journey and hope to see you inside the course!!

Here's to less work and more life!

Laura

