Ep #48: 3 Systems Myths Debunked with Katie McFarlan

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With Your Host

Desi Creswell

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Hey designer, you're listening to episode 48. Today I'm teaming up with Katie McFarlan from Dakota Design Company. We're sharing three of the most common myths about systems that prevent you from implementing them and using them to their fullest potential.

Welcome to *The Interior Design Business CEO*, the only show for designers who are ready to confidently run and grow their businesses without the stress and anxiety. If you're ready to develop a bigger vision for your interior design business, free up your time, and streamline your days for productivity and profit, you're in the right place. I'm Desi Creswell, an award-winning interior designer and certified life and business coach. I help interior designers just like you stop feeling overwhelmed so they can build profitable businesses they love to run. Are you ready to confidently lead your business, clients, and projects? Let's go.

Desi: Hello, designer, welcome back to the podcast. So glad to have you. As always, today's a special day. I have a friend and colleague joining me, Katie McFarlan. And I was thinking about it and I can't remember exactly how we got introduced or found each other. But at some point we figured out we have very similar philosophies to running a streamlined interior design business and focusing on client experience as one of the benefits of that, for you and the client.

And I'm remembering that we started messaging each other on Instagram. And then, I don't know, one of us said, "We have to do something together." And then the other person said, "Yeah, I was thinking that too." And so that's how we met, and here we are. So I'm really excited to have you, Katie. I'd love for you to share who you are, how you serve designers, and anything else that you think would be helpful for listeners to know as we get started.

Katie: Yeah, definitely. Well, thank you again for having me. And yeah, I also don't remember. I feel like it was a couple of years back we started messaging on Instagram and then we just kind of did a couple of things here and there. I've brought you into my audience and you've brought me into yours, so it's been really fun to collaborate because, again, we speak to the same issues that we see a lot of designers have.

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So what I do is, my company, we offer business consulting for interior designers, and then we also offer a done-for-you implementation of systems setup for designers. So what that means is we essentially come in and I do the consulting aspect, so I talk to my clients about setting up their services, designing their processes, pricing, building out their teams. We really look at all operational aspects of their company.

And then if our clients choose to have implementation, then we can also go in and set up those systems for them. So, typically we're setting up a project management software, and a CRM, like HoneyBook or Dubsado or something like that. And then we're helping them to kind of get it all up and running within their company with their teams.

So, again, I just have a big philosophy of like, it all starts with your client experience. And your client experience is really just your process of how you take a client, or how a client goes from point A to point Z with your company. And that point A is like when they first find out about you online. And then the end point is like when you off board them and are wrapping up your project and all of that.

It's just so critical and I think just the conversation we're going to have today, it's really going to pull a lot of that in. It's like it really all comes back to your process and the confidence that you can gain from having a good process in place. Regardless of how different each of your projects are, you typically probably do have the same process. So that's like my big philosophy on the work that I do.

Desi: Yes, I think everyone has some kind of process. It might not be the most effective process or it might not be documented. But typically, you've got some kind of process, and I think that is just a relief to know, because you've got a place to start. It doesn't feel like this big overwhelming thing, which is, of course, one of the things we're going to talk about today on the subject of three myths about systems.

And one of the reasons why Katie is on here is obviously because she is such an expert and could talk about these things and nerd out with me all day long.

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Katie: Yes.

Desi: The other thing is we did an interactive workshop earlier this year on this exact topic, the three myths about systems in your interior design business and why these myths are actually holding you back from implementing systems and then also fully utilizing them. Because both of us work with clients or encounter clients that have systems but then don't use the systems.

Katie: Yes.

Desi: And this training was so popular, I was trying to remember, I think we had to close the doors to it because we had so many people sign up, which was fantastic. And I thought the training was just so value-packed that we needed to have this conversation in a place where anyone could access it at any time, it would be easy to hit pause, take a note or rewind and listen again.

Katie: Yes.

Desi: And I should note, and I'm sure Katie will share this too. But if you want to make sure that you're aware of these types of trainings that we offer, both together and individually, be sure to check out the show notes so you can get on our newsletter list so you don't miss out on these in the future.

And the other thing Katie and I talked about, we might not say the same thing that we said in the training. It might not be wildly different, but who knows what's going to come out of this?

Katie: Yeah, definitely.

Desi: So even if you attended the training, make sure you keep listening because, as you can already hear, Katie's got a lot to say about this, I've got a lot to say about it. It probably will be a little bit different than the way we first delivered it. And even if we say the exact same thing, it never hurts to hear something twice, because you don't know what's going to land.

Katie: Well, exactly. And I think too, with every client and every project you close out, you always are learning something. And so something that we said last time

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may not have landed or hit, but this time you might be like, "Now it makes sense because if I had done this thing, it wouldn't have happened with this last project." So I think there's just always so much to take out of it because your business is always growing and changing. And with every single client, there's just always something different that happens.

So yeah, I think we'll definitely have more points to expand upon than last time. It'll be a little bit different.

Desi: Yeah, for sure. And the other reason I thought this would be a really great time to bring this conversation to the podcast is because you've probably heard me talking about my To Do To Done five week coaching intensive that's starting in October. And this is really where we're going to free up time to do those things that you wish you'd been getting to, but never seem to get to.

And for so many people that is identifying their process, streamlining their process, setting up systems in their business. So I don't want one of these myths to be one of the reasons why you don't start taking action on systems and processes in your business. Whether that's working on your client experience, setting up an onboarding process, whatever it is, those would all be great projects to start and finish in To Do To Done.

And we're going to kick off October 6th, so if you want more information on that training, and how you get to work directly with me in that container, go to the show notes. And you can also go to desiid.com/todotodone.

All right, so let's dive into today's topic, three myths that are preventing you from creating systems in your business and or preventing you from fully utilizing those systems to their full capacity.

And before we share the myths, I really want to sell listeners on why systems are so important. It's not just a nice to have or something you'll do when you get to this undefined place in your business then you'll be ready for them. It's really essential to have a defined process and systems to support that process to build a thriving business.

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So, Katie, I know you're passionate about this, why don't you sell our listeners before we get started? Tell them why they need to get started with this work now.

Katie: Yeah, so, again, a lot of times when we talk to our clients about their process and what they're doing and they say, "Oh, we don't have a process, we don't use any systems or software or any of that." I mean, the thing is you do. As a designer, as a creative, you do have a process. And maybe that process is before I start designing I go look at coffee table books, or I go to the showrooms or I look on Pinterest for three hours before I even start doing the first part of my design work.

So you have a process where if I told you, you can't do this, you can't do that, you can't do this other step, you would be like, "I can't do the design then," right? So I think you do have a process. You do have a system for getting your clients the result that you're getting them.

And the importance of really documenting it and making sure that it is actually supporting you and your clients is that it allows you to identify opportunities where you can be more efficient. Identify things where maybe they're just not even adding value and you can eliminate them altogether, right?

Like we've had some clients who add all these steps and meetings to their process and it's actually not good for them and it's not helping their clients. And it's just costing them more time and money, right? So you're able to identify, hey, let's just remove these whole steps.

Also, whether you're a solo or you have a team, I mean, it's really the only way you can scale, is if you have these standardized services, streamlined processes and then software or systems to support you so you can automate some of the busy work and easily delegate and not have to micromanage your team, right?

Like for me personally, I like things to be a certain way. And so we have processes for a majority of the things that take place in our company. And my team just follows those processes and then I know that it's being done how I

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want it done and I don't need to be crazy like micromanaging and being like, "That's not how it's supposed to be done." It's like how can they know if I don't tell them?

So I think systems and software are kind of different. I look at a system as just a series of things like processes, tools, et cetera that you use to accomplish something. And one of the pieces of your system might be a software program like Asana or hopefully you're using a product management software like House Pro IV, Studio Manager, Design Files, one of those.

There's different components that are going to make up your system for getting from A to Z, but you have so many things in your head already as a business owner. And a lot of my clients, 100% of my clients are women. Desi, I'm sure you have a primarily female audience and client base. As females, we have a lot of responsibilities on our plate, right? And there's so much in our head and I think it's so important to get it out of your head and into this well-documented system so you aren't responsible for retaining all that information.

So then you have space for that creative process and to dream and ideate for your clients and solve all these problems that they have in their house and in their design, right? So I think it's just a way to support yourself to actually be profitable and have a sustainable business.

Desi: Yeah, I just want to recap that because it's so important. All right, so first of all, the calm and mental clarity that you get from having things documented and sorted out in this way cannot be understated. If you think about the level of mental activity you use up in a day trying to hold this all in your head, I mean, let's just talk about the weight that would relieve just from that alone.

And then, of course, you're going to be way more profitable. You're going to know how to price your projects better, set your fees better, you're going to save yourself a ton of time. You're going to have quicker turnarounds for your projects. You're not going to let those projects drag on and on and on. And you're going to know when you can start a new project.

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And then also the delegation piece of it is so, so important. I always say the best way for people to read your mind is if you write it down, or sometimes record it. I like Loom videos. I'm sure you're a fan of those as well, to visually show what's happening.

Katie: Yep.

Desi: And, I mean, so hopefully, you're all like, "Yes, I need systems now." And you also might be thinking, but I don't know if they're for me or I'm worried about getting started or I don't have time. So I think we should dive into the myths. What do you think, Katie?

Katie: Yeah, yeah, I agree. One point I want to add too, when you have these systems and processes in place, is you have consistency across your projects regardless of the type. So it's essentially quality control. And it's a way for you to standardize it and implement it across your team. So everybody knows, like, this is the standard of work we do and this is what we put out. And I know that it is to our high standards because I followed the process.

And without that, how do you know, right? And then every client does have a different experience. And, again, just as a business owner, there's so much confidence that comes from knowing, hey, I'm treating everybody with the best experience possible because we go through this checklist. And we do these things with every single project and we don't miss a step.

So again, it just all comes so full circle, right? Like when you have that confidence, it impacts your pricing and you screening out clients who might not be a good fit and all of that. So yes, let's dive into the myths.

Desi: Yes. Okay, I love that you brought up the quality control thing. I just have to say one more thing about that because think about this, not only are you able to delegate then, but also thinking about team turnover or bringing new contractors or new types of support into your business. That's something that we talk about a lot in my group program, Out Of Overwhelm, is hiring support or managing your support that you currently have.

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And when it's all documented, that makes it so much less scary to let someone go that's maybe not performing the way you want. Because you know they're not the key to your entire business, it's all written down.

Katie: Yeah.

Desi: So I'm glad you brought that up.

Katie: Yep.

Desi: All right, so myth number one. I'll say the myth and then I'll let you do your thing, Katie. And I'll, of course, be chiming in as well because I can't help myself. All right, myth number one, I have to put systems all in place all at once, and it's going to take too much time. What do you have to say?

Katie: Yeah, so I agree. And this is for any project that you ever take on, right? Like when you meet with a new client, you're not just designing their house and being an install day. You break it down into these little pieces, right? You go through your discovery process. You go through probably your furniture layout and your drawings, you go through that process. Maybe you do a concept, then you go to a presentation, then you revise, then you manage, then you install, right? It's broken down into all these little things.

So what I typically recommend to our clients is don't do everything all at once because each change you make is going to have a domino effect that maybe other things don't need to be changed. And maybe not everything needs to be changed. So I always like to look at what's broken.

Look at your process, look at your team, or you or your clients and what is painful, right? Where are you getting the most questions? The most, like clients are just falling off, like you don't hear from them. Where does it feel like oh my gosh, I just worked 40 hours on that and we made no progress? What actually hurts? Or what is going wrong from the client's side? Where do you get the most questions, pushback, all of that? Fix that, right? Fix that first.

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Typically, a lot of the problems we see, it's all coming from the onboarding process because you aren't establishing any expectations right up front. So typically that's what we really are going to focus on the most.

That's kind of like, I'd say 90% of the time that's the issue, is they start a new project and they just start immediately. There's no process. No one tells anybody what they're supposed to be doing. The clients have no idea when to expect the next thing. And now we've got questions and emails, and, oh, I went shopping and I found this. And can you come to my house tomorrow?

Whereas if you had a good onboarding process, you would have explained to them like, hey, this is what happens in this many weeks. This is what we need from you. This is what you can expect from us. Other than that you can just sit and enjoy. We will do this thing on this date.

So I would say start with what's broken, right, where you have the most issues. And then I think, when you dial in just on that one specific part of your process, look at okay, what are those questions we're getting? What is happening?

And what pieces of material or information can I create one time, but use every time with every client, to support them? To let them know, hey, this is what the process is. This is what we need from you. Here's what you don't need to do anymore. Like you don't need to be on Pinterest anymore. You don't need to go shopping. You don't need to send me more pictures. That's for onboarding.

So what can you create one time that you can use over and over again with your clients that will support you and them and really tighten up that one part of the process that you have? So those would be my thoughts.

Desi: Yeah, I 100% agree. I'm just sitting here nodding along. The way I always ask the questions – You're talking about what's broken, I always ask the question of what's creating friction or slowing me down, or just plain frustrating me?

I think that is just such a great place to start because I think a lot of times, and we'll talk about this probably a little bit more later, but we feel like there's this right place to start. And you've got to get it exactly like start to finish. But just

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solving the most broken piece can make such an impact, and then you can always layer in more.

Katie: Well, and it's immediate, right?

Desi: Yeah.

Katie: I mean, again, if you've already brought these clients into your pipeline, you can't go back and onboard them. But you could create this information and send it out. Hey, we just did a couple updates in our company, we wanted to share them with you. We're really improving, we know this is going to improve your experience with our company. Here's what you can expect going forward. Like it can have an immediate impact.

And I'm not a psychologist or anything like that, but you like those little hits of dopamine. You get one and then you're like, ooh, that worked. I have energy now to do it again. What can I fix next, right? It kind of just creates this forward momentum that, as a business owner, sometimes it's hard to feel that momentum when you're just always head down working.

So just, again, you get that immediate, like you see that immediate result from fixing the thing that's broken.

Desi: Yeah, and doing it one at a time you are really shifting from the thought, "I have to do it all at once," which instantly creates a feeling of dread or pressure, to, "This is working, I'm doing this." And that, I mean, even just saying those words out loud to myself, I feel a shift in the energy in my body.

And I think for a lot of designers, this is a common thought pattern of, "I have to do it all, I have to do it all at once," and it's showing up here in systems. And when we have that thought around doing it all, or another flavor of it is it's all important, is we generate the feeling of overwhelm for ourselves.

And I've talked about this in past episodes, where overwhelm is really this indulgent emotion that we create for ourselves and we can opt out of it because it's coming from the thought, I have to do it all or it's all important. And then when we're kind of in that spinning state, we don't take action on anything.

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And that's why I love the questions that both of us shared in our own ways to really pinpoint one thing that you can then prioritize. And then I always like to picture the dominoes falling, right? And you're talking about the momentum that you build.

And it doesn't have to take a lot of time either. It can be something that a small tweak could make a huge difference. Or maybe there's lots of small tweaks, but you're just going to pick one. And for a lot of designers it's, I don't know about you but I get the comment of like, "Oh, I wish I could just close up shop for a week and go heads down and fix all of this at once." But that's not really possible.

And that's why I teach the project breakdown process that you can use with the systems. And I've talked about that here on the podcast. And it's what I'm going to be teaching in To Do To Done as well, so that you can take it chunk by chunk and actually make it fit into your schedule. So that way you do start generating that momentum for yourself, and then you're off to the races.

Katie: Yeah, yeah. I mean, again, the process is so iterative, and you likely don't have every client in the same phase at the same time, right? So you do have time. And if you don't have anything in place, no one's expecting anything from you. So really, it's just a bonus, right?

If you're going to put the structure around your process and provide them with this information about what they can expect because, again, you just have to remember your clients likely haven't hired a designer before. And if they have, it's likely different than you, right? Because you're here listening to this podcast, and you obviously have a commitment to providing this excellent experience to your clients.

Not everybody's like that. There are some designers who just fly by the seat of their pants and that's how they do it, right? So, yeah, I think it's definitely one thing at a time. And even if you're looking at actual software or something like that. I mean, we set up software for our clients and we train them on it, and it is still overwhelming for them, right?

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So, again, if you're doing this on your own, look at what do I need to solve for? Am I stuck in admin? Am I doing the same things 10 times a day that are just like killing me? Or am I getting emails from my team and text messages and Slack messages and all these things? Like Desi said, where is this friction? And what could you just do immediately, right?

So sometimes for our clients we just say, "Okay, let's get project management software, and let's just dump all of your open projects into it. We'll put them all into a project, we'll get a bird's eye view, and we'll just see what's really in your head right now."

And just that alone, they're like, "Oh my gosh, I had no idea I had 37 open projects." And I'm like, and there we have it. Now we know, yes, you are actually really busy. You have a lot going on. And so now it doesn't feel like I have no idea what's happening or why I feel like this. Now you're like, now I know why I feel like that. Now we can do something about it, right?

So again, there's just little things like, where does it hurt? Where are you cringing? And just make that one step.

Desi: Yeah, absolutely. I love it. All right, let's talk about myth number two. I'll start when I have more information or when I take this class, XYZ. What do you say to that?

Katie: I mean, it's so hard. There's so much information out there and there's so many things you could be doing and should be doing. But again, I always come back to what are your gaps, right? Don't just fix things and layer things on that aren't an issue for you, right? And we do that, right?

And, Desi, I think you'll be able to talk to this, we do what is a form of procrastination. We don't want to poke the thing that's broken. We don't want to deal with it. We don't want to remember that one time that that totally ruined us, right, because we didn't have this thing in place.

So I think, for me, the real important thing is it's your company, you are truly the only one who's going to do this for your company and make this change, not just

for your company. But if you have a family, for your family. For better work life balance. For all of those things.

So I think it's really important to – If you want to consume information, that's fine. But only consume information that is relevant to the gap that you have in your business.

Desi: Yes, yes.

Katie: The gap is the thing that's broken. So don't go learn about marketing if you have too many leads and you cannot take another darn client. Don't listen to marketing stuff. I want you to listen to, I don't know, maybe screening or pricing. Get your pricing, right? Like what's broken, and then find that information if you need it.

I also think a lot of people will say, oh, I need to set up a CRM. I need Dubsado or I need HoneyBook or I need to have everything automated and delegated. Well, you can't do that until you know your process. And you can't do it until you can manually do your process. Like I can't set up an automation for you if you don't know what happens at that meeting. Or if truly every meeting it is different because the client is in charge.

So you can't automate those individual things, right? Like you set yourself up to have a business where you have to be hands-on and involved every single step of the way. So I just think, again, don't jump ahead to something that you don't even need yet. So those would be some things that I would say.

Desi: Yeah, totally. I'm glad you brought up the procrastination piece because we can definitely do a whole lot of procrasti-learning is what I call it.

Katie: Yes.

Desi: And it feels really good because you're like, "Yes, I'm taking action. I downloaded this PDF." But then it usually stops there. And that's another reason that I created To Do To Done, for that particular reason because I see perfectionism holding my designers and the clients you work with too, I'm sure,

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holding them back and keeping them playing small in their business when they're so talented and have so much to share with their clients.

And sometimes, like you were saying, don't poke the bear. Like you don't want to remember what happened, but often it's also this fear of what if I do it wrong? And like I did it wrong last time, I can't be wrong again. So this time, now I've got to get it right. It's like we give ourselves one chance and that's it, otherwise we're off the island. But it doesn't work like that. It's so iterative, like we've been talking about.

And I always talk about it as the implementation cycle, where you're making decisions, you're implementing the decisions, you're evaluating the decisions. And then you make a new decision based on that evaluation. And you keep going until it works for you.

Katie: I mean, if you want to be in business for a long time, you have to be experimenting all the time. And everything you're testing, right? Like nothing is wrong, because you can fix it. You're working directly with your client, you are never going to be at a point in your project where you can't fix something. And because you're a designer, you can actually really, truly bring in trades to fix anything, right?

So there's no part in your process where you can't fix something that goes wrong. Like, hey, we tried this new software, it didn't work. We're sorry, we're going to back it all out. You can always save face with your clients.

So yeah, I just think that as a business owner in general, whatever industry, it's all about trying things. You can't just say this is the way it's going to be because it's perfect. And this podcast told me to do it this way, so that's how I'm going to do it. You need to respond to your market and your people. And there's always going to be changes overall.

Desi: Yeah, I was just coaching a client in Out Of Overwhelm on something similar, where she had purchased another program in the industry, which essentially, you're buying into this person's process and system. And she was

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finding that certain parts of that system or process just weren't working for her business.

And she was gaining some really useful information from implementing it and seeing what was working and not working for her. But then it was like, but this is supposed to be the right way to do it. I can't change the process because this person told me it was the right way.

And so there was kind of like this procrastination, perfectionism happening around, I know what I want for my business. I want to make that change, but it feels scary to make it. And sometimes we have to just take the leap and trust that we will figure it out and that we can fix anything. So I love that you brought that up.

Katie: And I think too, again, like we just started our first group program where we're taking designers through developing their process and all of that, and kind of what we've learned over the years of working with designers and all different types of services. So hopefully, this person wasn't in my program.

Desi: Oh, nope.

Katie: Okay, because we really talked about every different type of service that we've seen designers successfully offer to their clients. So we don't just talk about just full service, or just construction, or whatever. We talk about everything down to just offering a standalone consultation service.

And I think a big thing that we see, again, we talk about a lot of different services, is that when you consume all this information and listen to all these people, you have to always take it with a grain of salt because your goals are going to be so different from their goals, right? Like that designer you're listening to, their goal might be to have a nationally recognized brand and products in stores. Your goal might be to have a boutique firm. Your goal might be to only offer design only services. Your goal might be I want to take summers off.

Everybody has a different goal, so you have to really take that into consideration when you are taking in any type of information. It's like, no matter what they tell me, it still has to make sense for how I want my life to be, the goal of my

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company to be. Because if you're going to just learn about full service, that might not align with your life. If you have little kids and you want to be president, you want to take summers off, that might not be the best person for you to be listening to or taking information from.

So you always have to consider that when you listen to things, your goals are going to be very different. And your method for getting there and delivering your services might need to be different because of that.

Desi: Yeah, absolutely. That's why when I work with clients privately, and we do some of this too in Out Of Overwhelm, we're always looking at what's that business and life vision. So that way, the things you're doing in your business align with that vision. So you're not building a business that achieved somebody else's version of success.

The other thing I wanted to say about what we were sharing was when you get advice or law and from others, we also don't have the full context. So it's not even about what their goals are, but we don't know what type of support they have in their business. We don't know how many hours they're working. We don't know what outside funds they have to invest in the business.

So I think what you're saying that's just so important is, we want to make sure that we're always taking what we learn and filtering it through our own knowing of our business, of ourselves, the way that we want to work, what we define as success for ourselves.

And sometimes I find that the more information you consume, the harder it is to take action because there's so many different ways to run a successful interior design business. And at some point, you just need to decide what you're going to try for right now.

And I think one of the questions you can ask yourself if you do think that maybe there is a skill gap, because sometimes there's a skill gap, sometimes there's a mindset gap. If there's a skill gap that you think is there, get really clear on what that specific skill is. And then I love what Katie was talking about with constraining your consumption.

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And then ask yourself, how am I going to know when I'm ready to take action? Because often, if we don't define that for ourselves or get clear on what that point of I've got enough information to get started is, we never allow ourselves to feel ready. And we're going to stay stuck then in that I need more information, I need to take another class mode. And it's going to really prevent you from getting into that implementation cycle I talked about, which is how you're actually going to figure it out.

Katie: Yeah, I mean, again, we see it a lot, right? Because I don't know, there's not a lot of people who work specifically with designers who are doing the consulting with also system set up, like how we do. And so we see a lot of it, like they've taken a lot of classes, invested a ton of money. And it's been really helpful, but they're still so overwhelmed.

There's so much information in their brain and it hasn't resulted in anything on paper, right? They haven't plugged it in and applied it. So yeah, I absolutely, like I'm kind of a head down type of person. Like, if I recognize that I have a gap in my process or in my company, one, it's because I have systems. So it is clear as day when we have an issue because it's because there's a gap in one of our systems or processes. So it's really easy to spot it.

But then I identify, okay, is this information I'm seeking? Is this expertise? Or is this someone else? Like, okay, for example, we have stuff on Pinterest and I needed to get my Pinterest tag figured out. So I did like a two minute search, I could not understand it for the life of me. And so am I going to learn how to build a Pinterest tag and add code to my website and all this? No, I'm not.

So I identified immediately this is something we need to do. But I'm going to hire somebody to do it, rather than go and learn. Maybe I could take a course, but also there's a point where your time has value. And if whatever you're learning about isn't tied directly into the profitability of your company, you should just set aside a certain amount of time each month for this professional development or learning or consumption or whatever.

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And then, like Desi said, cap it and then have a plan, right? Like know when you're ready. But the answer isn't always going to be more consumption. You've got to take action in some way.

Desi: Oh, and that's when the feelings start coming up.

Katie: Yeah, right?

Desi: Which is why the mindset is so important too, to complement the action. Yeah.

All right, let's talk about myth three, my client/team/contractor/everyone will push back. What do you have to say?

Katie: I mean, yeah, probably they might initially. And here's the thing, it's your company. It's your business and you have the final say. And we do see that a lot. When we're setting things up we get a lot of pushback from team. And they don't want to use this and it's not going to work and blah, blah, blah. And honestly, as the business owner, it's up to you.

If this is the new process because you know that this is a better way for you to work and manage your projects and your own mental health, which is really what we see a lot, then they're obviously not somebody for you. And it's not somebody you want to have on your team or not somebody that you want to work with.

But what I really think is, you always want to look at the benefit to everybody. When you have these processes and systems in place, they protect you. They let your team know exactly what's expected of them. They can clearly communicate boundaries, which makes everybody's life easier. Not only will this protect your team, but your clients won't be reaching out to your team, like texting them on the weekend like, so and so did this, or can you come here and pick this up? You're protecting them in so many ways.

And I think also just putting those boundaries in place, it helps to prevent any of that pushback because you're kind of saying like, this is how we work and here's what you can expect this entire time and this is our process. So, to me, it's very

supportive once it is adapted. You have to position it in a way like this is going to be better for everybody.

Desi: Yeah, I call that the same team mindset, essentially. Like we're on the same side of the table. We both want the same things, which is to have a really awesome project at the end of this.

Katie: Yep.

Desi: And this is going to be one of the ways we support you in doing that.

Katie: Yeah. And I think, again, build a team where you have this open line of communication. Where you can say, I don't want you to do things you don't want to do. We can find somebody who can do those things, but also I need you to tell me what's not working and give me feedback and why you think this might not work. And let's come to a solution together, right?

And I think a big one for me with systems and software is communication. There's communication everywhere and I still have clients who only use email with their teams. And I'm like, how do you do this? Oh my gosh, I feel like this is such an antiquated way of doing business efficiently. And especially if you have a big firm, or you want to have a big firm, that is just not a good way to do business.

And for certain companies, I'm always like I think you guys should do this. I think you should move away from email. I think you should move over to this. And it takes a long time to get the companies on board. But once they start to see it and see how much time savings there is, and just you guys have so many things going on within one single project. And then you have five or 10 of them going on at the same time. Like it's mind numbing. To me, I don't understand why people would push back.

Desi: I think the pushback really is against the activation of doing something new. Like whenever you're starting a new habit, whether that's drinking some extra water during the day, it takes some energy to rewire your habits. And it's always easier in the moment to do what you've always done. And we, in those

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moments, really forget the future gains of choosing differently that time. And I think that's why, really, it comes down to it.

Katie: Yeah, and I think, kind of like what you've been saying, it's kind of everyone's mindset around it. Like it's going to be too much work. It's going to be hard. It's not going to be the thing we actually end up doing, so we're just going to waste time.

So I think it's really being committed to it and knowing the benefits of it and presenting it to your team, your clients, your contractors as like, this is going to make it so much better for everybody because you're going to get responses to your emails more quickly. You're going to get answers more quickly. You're going to get all the information upfront right away. You're going to have less questions from clients, less pushback from whoever because we have these systems and processes in place.

Desi: Yeah, I think it builds so much trust in relationships, going back to our very first piece around setting expectations. And then having a process to follow through on those expectations, I think, really establishes you as the expert, establishes you as the leader, and builds trust all around.

Katie: Yeah, and again, don't build a company you don't want to work at, right? If your people aren't going to follow your process, but it's your process, it is the way you know gets your clients, who are the most important thing in your business, that's the way you get them the best result, the most efficient design process, they have a beautiful space they fall in love with and are completely obsessed with.

Why would you ever deviate from that because your team doesn't want to use the software? Like, yeah, no, you are the expert in your company and in how to be profitable, right? So it is so pivotal, and if people aren't going to do that, don't build that business with them. Find people who will come in and support you and advocate for, yes, whatever you think will be good to support you, business owner/boss, I am happy to take that on, right? That is the type of team you should be building.

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And even with contractors, like contractors can be tricky, right? It's typically more male dominated, interior design is typically more female dominated. So there's going to just be some of that happening on the job site. But I think it's how you position it. And when you know your process and you have a system for working on construction projects, you know exactly that, like, hey, right up front, we're going to outreach to the contractor involved in our clients project. And we're going to talk to them about their process.

And we're not going to position it like, this is how we do things. We're going to say, how do you do things? How does your process go? Here's our process. Let's find something that works, right? So it's not like, I'm a designer and you have to do whatever I say. We have the same goal, get this client's project done, make them happy and be profitable. By us working together and joining our processes, that's how we're going to do it. So let's figure out a path to do that.

If somebody's like, I don't want to be more profitable or I'm not going to follow your process, you obviously won't work with them again if they're pushing back and all of that. Same with your team and things like that.

Desi: Yeah, and I think it can be so helpful to share the why behind the change. And not just the why for you, but the why for that person specifically. So know your audience and understand what's in it for them. What's the pain point that you're helping to resolve for the contractor, your team member, the client, whoever it is, so that you can actually sell them on why this is a great solution. Because going back to what we were talking about before, when we're presented with change, most often our first response is going to be, I don't want to do that. So we want to try and get ahead of that.

And, of course, you're going to have to be willing, as the leader of the business, to work through the kinks. Because you're not going to do it all the time, you're going to be the one who has that, "Oh, screw it" moment. Or it's going to be your design assistant who just plain forgets because they aren't in on the whole thing and realize what an impact that one little thing is to the whole process, right?

So you have to be willing to go through that friction of getting started with something new and know that it's going to be paying off in the long run.

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Katie: Yeah. Yeah, I think commiserating too. Like, hey, I've got to learn this new stuff, too, but I know that it's going to be better for the company and for everybody.

Desi: Yeah, for sure. All right. Well, I know that both of us could just go on and on and on with more myths, more comments about all of this. But I think we should probably leave it here today. This is getting a little bit longer than my typical episodes. But if you all designers love this, let me know. Let Katie know. Maybe we'll do a part two, we'll see.

And I think we covered so much ground, let's just do a quick recap here on the myths. So myth number one is I have to put them all in place, all being systems, at once and it's going to take a lot of time. Myth number two, I'll start when I have more information or I take this class. Or Myth number three, my client/team/contractor/employee will push back.

And I am so curious which of these myths are resonating, or if as you're listening you're like, "Yep, yep, yep," to all three of them, I'd love to hear from you and I'm sure Katie would love to hear from you as well on what resonated most during our conversation.

Katie, thank you so, so much for being here. It's always a delight to chat with you.

Katie: Yeah, thank you for having me. This was fun.

Desi: I'd love for you to share with our listeners how they can get in touch and follow along with you.

Katie: Yeah, so you can find my website at www.dakotadesigncompany.com. We do have a weekly newsletter where designers can submit questions and then we answer them in upcoming blog posts on our Dear Dakota series. And then I'm also on Instagram at just Dakota Design Company, so you can find me online in either of those places.

Desi: Awesome, thank you for sharing that. I'm sure everyone's going to go find you immediately after listening to this.

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And, as a reminder, the enrollment for To Do To Done, the five week coaching intensive that will be kicking off in October, is going to be closing next week. So if you want to learn how to plan out a project that you've been putting off because there's always something more pressing, take action on it and execute it during that five week intensive with my support, make sure you go to desiid.com/todotodone to get all of the details and to sign up.

And, as always, I'll be back next week with a new episode. And until then I'm wishing you a beautiful week and Katie a beautiful week as well.

Katie: All right, thank you.

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