

ScaleTime

SCALE then XHALE

Corporate Dropout → 20+ years of ops Helped 500+ Agencies in 5 Continents

BEFORE

YEAR 1

YEAR 2

YEAR 7



Get Out of the Weeds Today! Use AI to Create SOPs 5x Faster

1. Identify the SOPs Gaps



2. Make a Project Plan



3. Delegate to Your SMEs



4. Use AI in Your Workflow



5. Optimize Your SOPs



Forbes

LinkedIn

Entrepreneur

SBA
U.S. Small Business Administration

TechRepublic

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What Is It **COSTING** You?

Step 0.

Does common
sense even
exist?

Owner

Crap, I can't
find it!

Manager

How do I do
this? *(again)*

Team member

Average employee spends 2 hours a weeks looking for files

2 hours

X

50 weeks

X

hourly wage

=

\$\$\$ Waisted

Compound by

X

no. of employees

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Team threw owner
a doc intervention.



Doing

Searching the server for
disorganized docs and
creating new ones
Time: 3 hours on avg

TEAM

Full Time: 8
Average Salary: 65k
Average hourly: 31.25
\$\$\$ Wasted: 37.5k / yr

Not
COUNTING

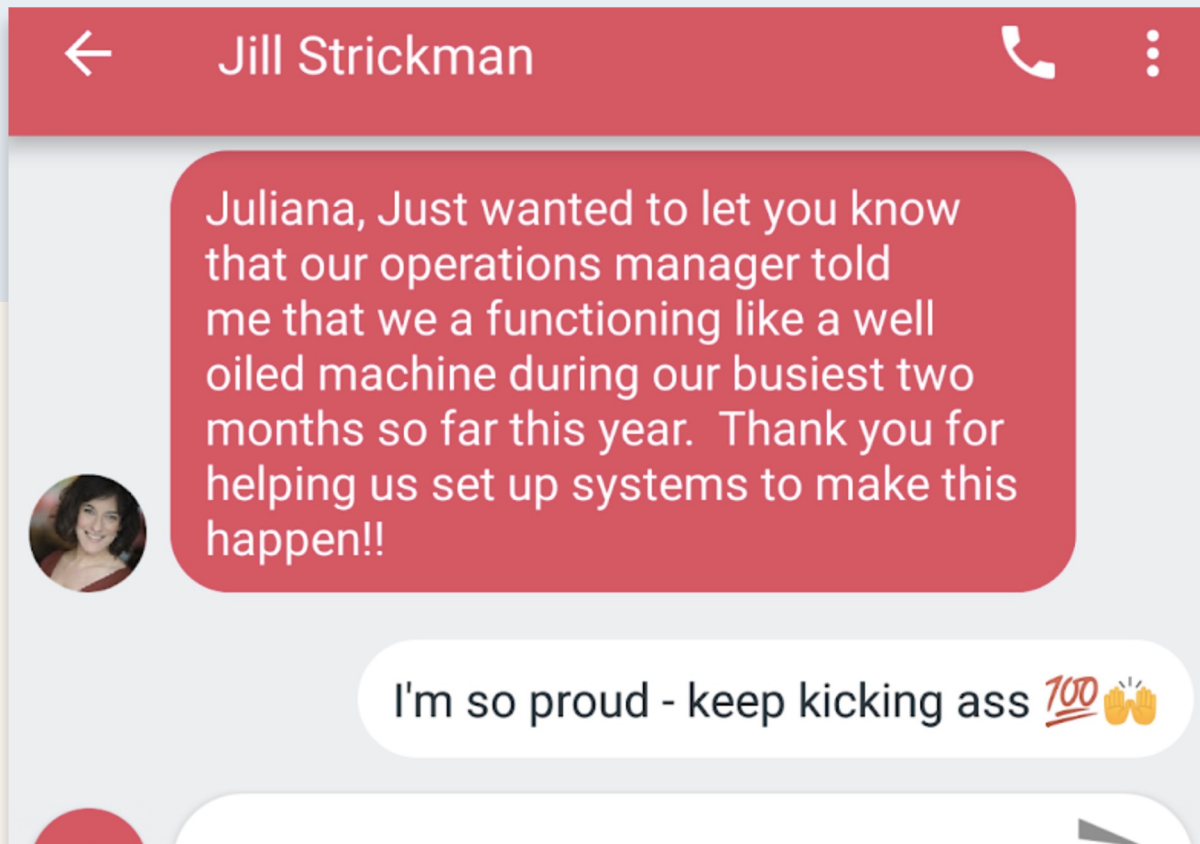
Part Time Staff: 22
Time Micromanaging
Answering same Qs
Slow team onboarding

\$\$\$ Wasted
= \$37,500 USD

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Transforms into a Well-oiled Machine

Productized Service & Launched Internationally



Now It's Your Turn

TO GET STARTED

Download Your Brain



“Training Increases Productivity by 25%”

- Bureau of Labor Statistics

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Identify Your SOP Gaps

Classify & Centralize

Step 1.

Business Function	Process	Do you have an SOP for it?	Is it standardized and up to date?
Production			
	Create process documentation	<input type="checkbox"/>	<input type="checkbox"/>
	Use PM tool	<input type="checkbox"/>	<input type="checkbox"/>
	Use Communication tools (eg. slack or teams)	<input type="checkbox"/>	<input type="checkbox"/>
	Create a new project	<input type="checkbox"/>	<input type="checkbox"/>
	Manage employee capacity/workloads	<input type="checkbox"/>	<input type="checkbox"/>
	Produce monthly client reporting	<input type="checkbox"/>	<input type="checkbox"/>
	Client setup (eg, fb manager, domain setup etc)	<input type="checkbox"/>	<input type="checkbox"/>
	Execute service - A (eg. simple website)	<input type="checkbox"/>	<input type="checkbox"/>
	Execute service - B (e.g. lead gen campaign)	<input type="checkbox"/>	<input type="checkbox"/>
	Execute service - C (eg. social media calendar)	<input type="checkbox"/>	<input type="checkbox"/>
	[Add more rows below to include other processes]	<input type="checkbox"/>	<input type="checkbox"/>
Client Management			
	Client onboarding	<input type="checkbox"/>	<input type="checkbox"/>
	Launch kick off meeting	<input type="checkbox"/>	<input type="checkbox"/>
	Create client strategy	<input type="checkbox"/>	<input type="checkbox"/>
	Run a client meeting	<input type="checkbox"/>	<input type="checkbox"/>
	Triage client requests	<input type="checkbox"/>	<input type="checkbox"/>
	Client offboarding	<input type="checkbox"/>	<input type="checkbox"/>
	[Add more rows below to include other processes]	<input type="checkbox"/>	<input type="checkbox"/>
Financials			
	Monthly accounting reconciliation	<input type="checkbox"/>	<input type="checkbox"/>
	Client invoice reconciliation	<input type="checkbox"/>	<input type="checkbox"/>
	Conduct accounts payable	<input type="checkbox"/>	<input type="checkbox"/>
	Run collections	<input type="checkbox"/>	<input type="checkbox"/>

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Make a Project Plan

Create | Standardize | Optimize

Step 2.

GetGuru Knowledge Base Maintenance

GetGuru - SOP conversion 3

Board Table + View

Automate (2)

Search tasks...

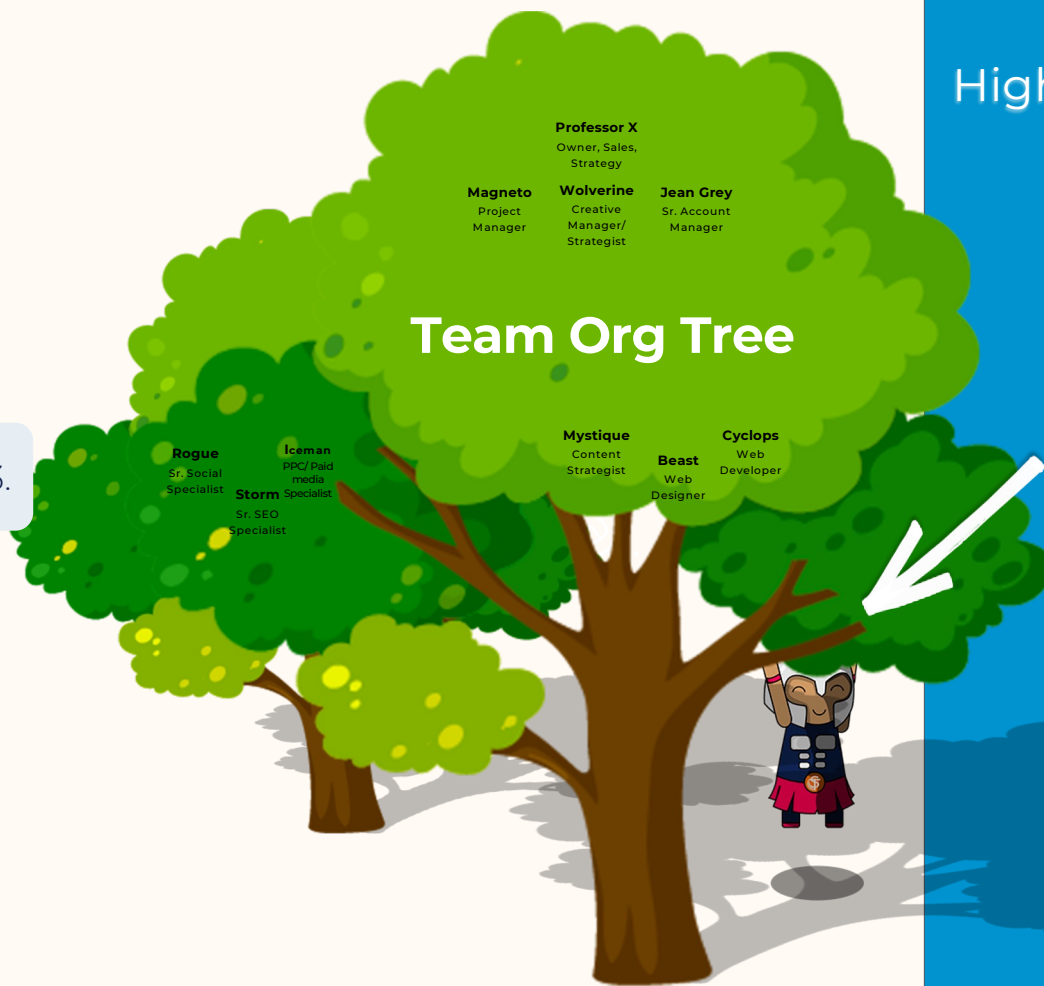
Group by: Category Subtasks: Hide

Me Assignees Share

		2 TASKS	READY FOR REVIEW	NEEDS TO BE UP...	STAGE	CATEGORY	ASSIGNEE	DUE DATE	PRIORITY
Client Maintenance Client Reminders	airtable				Needs a rewrite	v Client mana...			
Client Maintenances Pre-Session Prep	airtable				To Be Archived	v Client mana...			
+ New task									
Operations	Products	3 TASKS	READY FOR REVIEW	NEEDS TO BE UP...	STAGE	CATEGORY	ASSIGNEE	DUE DATE	PRIORITY
Creating an assessment in Kajabi	airtable				Updated in Get...	Operations			
Adding Content to Kajabi	airtable				Updated in Get...	Operations			
Updating Dates at the end of the year in Kajabi					-	Operations			
+ New task									
ScaleTeam	Sales	1 TASK	READY FOR REVIEW	NEEDS TO BE UP...	STAGE	CATEGORY	ASSIGNEE	DUE DATE	PRIORITY
Onboarding of New Salesperson	airtable				Updated in Get...	ScaleTeam			
+ New task									
v Client management - Succe...		23 TASKS	READY FOR REVIEW	NEEDS TO BE UP...	STAGE	CATEGORY	ASSIGNEE	DUE DATE	PRIORITY
Client Maintenance Client Scorecards	airtable				Updated in Get...	v Client mana...			
Client Maintenance Client Communication	airtable				Updated in Get...	v Client mana...			
Client Maintenance Offboarding Steps	airtable				Updated in Get...	v Client mana...			

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Step 3.



Delegate to SMEs
Highest Volume or Events First

Production

Financials

Client Mgmt

Marketing

Operations

HR

Sales

Strategy

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Training Types To Get Instructional Videos



Owner Pays for Training



SME Creates Training for Team Member

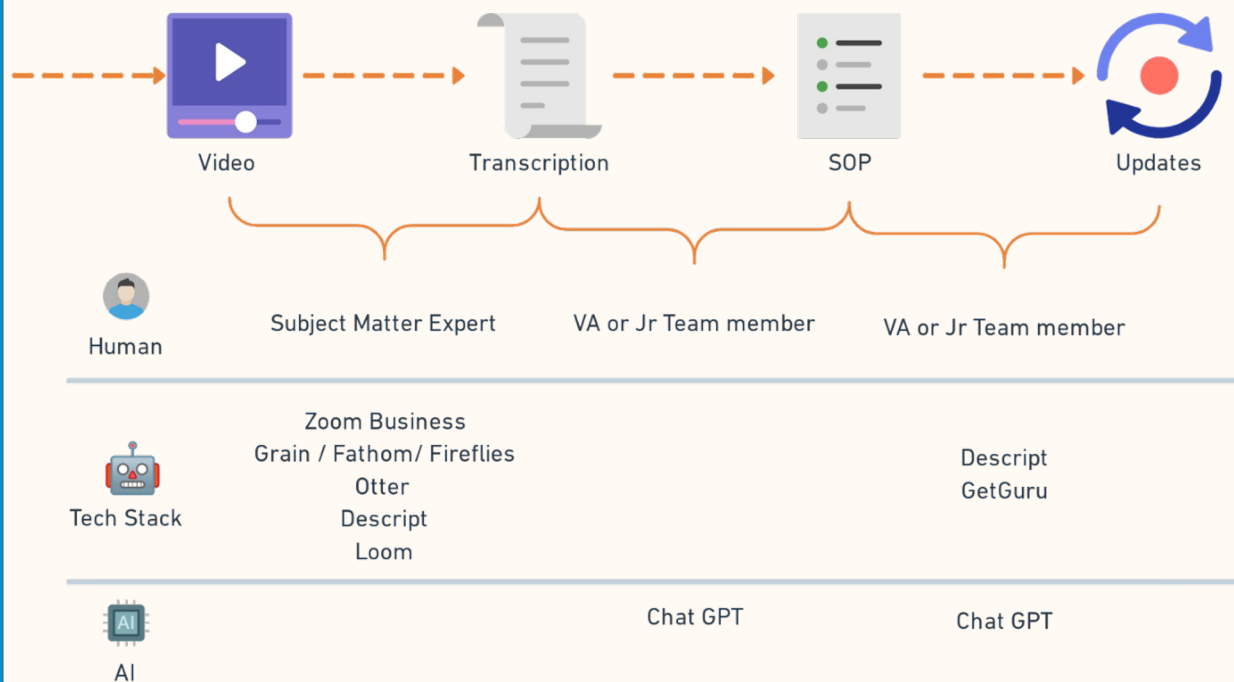


Team Member Creates Training for SME Verification



SME does Live Training

Creating An SOP | Instructions | Training w/ Velocity



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Process: Market LinkedIn Events

Original Time: 1 hour

Loom + AI: 7 minutes

Step 4.



Step-by-Step Guide for Creating a LinkedIn Event:

1. Go to your LinkedIn home page and scroll down to the "Events" section on the left-hand side.
2. Hit the plus button to create a new event.
3. Upload a cover photo for your event. This can be a graphic you have already created in Canva.
4. Fill in the required information, including your name as the organizer, the date and time of the event, and the format of the event (online).
5. In the event format section, select "external event link" and paste your Zoom link.
6. In the description section, provide details about the event, including the date, speakers, and other relevant information.
7. Add any co-hosts for the event.
8. Hit "Next" and then "Publish" to make the event live.

Note: Remember to update the date and other information in the description section as needed for each new event you host.



Prompt Cheat Sheet

Use AI In Your Workflow

Best practices for prompt creation:

- give your 🤖 context: what to do, for whom & how long
- tell your 🤖 if you are piecemealing work so it knows
- keep it in the same chat window to let your 🤖 to get context for better results
- review work & fact check your 🤖!
- if the 🤖's output is subpar, regenerate and/ or change your prompt
- be nice to your 🤖 b/c you never know when it will grow feelings

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Top 3 Prompts for SOPs

SOP Prompt: hey, I am writing an SOP and I want to use this transcript to write out instructions. Outline for me the steps by step instructions that I can use to train someone [insert transcript data]



hey I am writing an SOP and I want to use this transcript to write out instructions. Outline for me the steps by step instructions that I can use to train someone: Okay, so the first thing I do when creating a LinkedIn event is I go down to my LinkedIn at the home button. You're gonna scroll down and under events on the left hand side, you're gonna hit the plus button and I'm gonna create an event and I can upload a cover photo, which I already have mine downloaded.

Decision Tree Prompt: create a decision tree on whether something is a [x] or [y] based on this conversation [insert transcript data]



create a decision tree on whether something is a page or a cluster/hub based on this conversation

Our this tells me that we can rank for this with only creating this one page. Essentially, we don't need to create a bunch of other content to help rank this where if we're doing an article about digital agency process workflow, we probably need to do one article on that. We probably need to do an article about digital agency process where you probably need another article about. Agency workflow. And you could use these secondary keywords. That kind of help you steer you.

Merge 3-Step Prompt : Create the first SOP and ask the 🤖 to label it [x] (don't ask it to remember)

Label Prompt: Can you label this "sop1"

Combination Prompt: Can you combine SOP1 with this sop: [insert transcript or SOP]



can you label this "SOP1"



Sure, here's the SOP labeled as "SOP1":

SOP1: Standard Operating Procedure (SOP) for Content Strategy

Create SOP

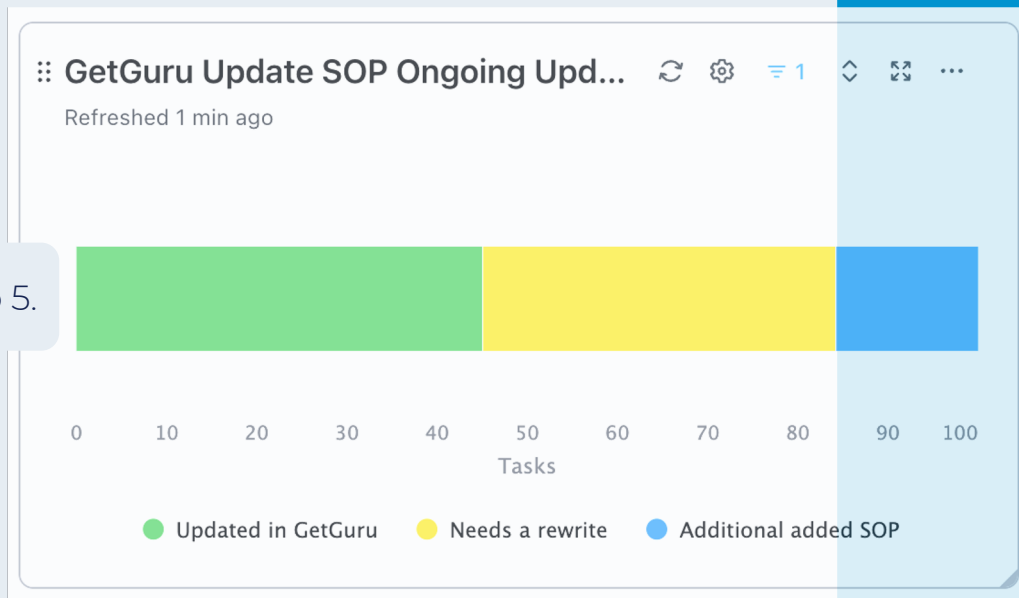
Analysis SOP

Merge SOP

Optimize Your SOPs

dirty draft → test → optimize

Step 5.



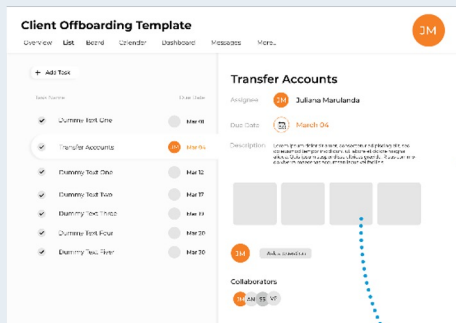
When to Update:

1. External Event
e.g. Algorithm Δ , G4
2. Vacancy
New hire, vacation, temp leave
3. Internal event
System migration, process Δ

Recommended Doc Hygiene

Don't let it get too hairy
2X a year (seasonal downtime)

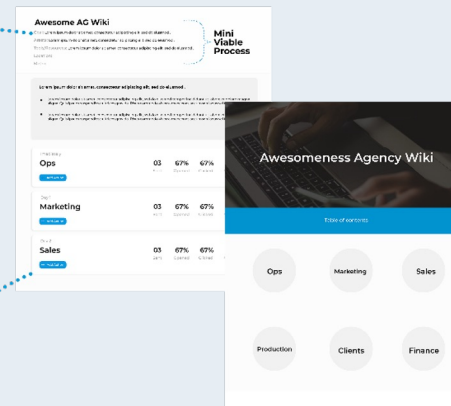
Project Management Tool
What you need to do; is being done.



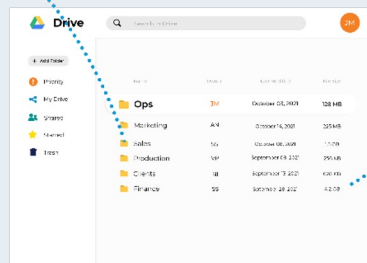
Same Structure = Easy Access
Increase in productivity



Internal Knowledge Base
SOP's are how you do things



Document/Assesment Management
Where your stuff lives



Pro Tip: Create a Wiki with a table of contents

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Scaled While Fired Biggest Legacy Client + Cut team in 1/2

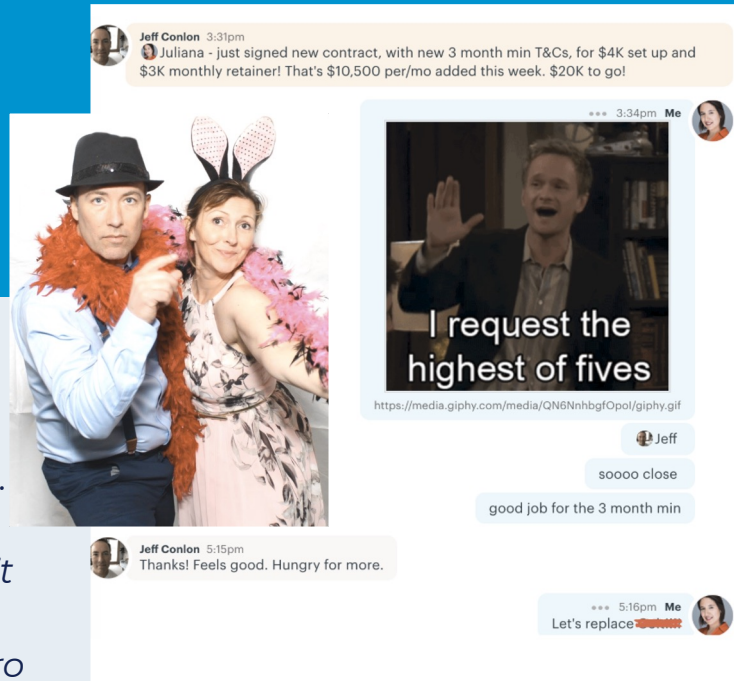
Jeff Conlon, IMA

7-figure agency fired
biggest client
(100k/month) and lived
the urban legend

Baby-geddon Vs. Baby 2023

*"We now have SOPs for everything,
everything is dialed in - Notion & Asana.
It's like we know what we are doing!
Abby (ops mgr) had a baby and it didn't
even f'n matter. We were cruising right
through it. She just built out Q4 and zero
hiccups.*

Oh and I worked like 20 hours a week."

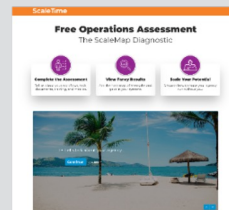
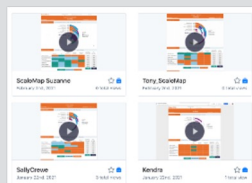
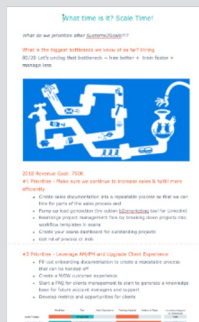
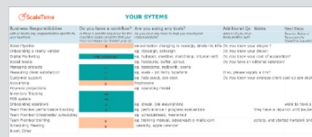
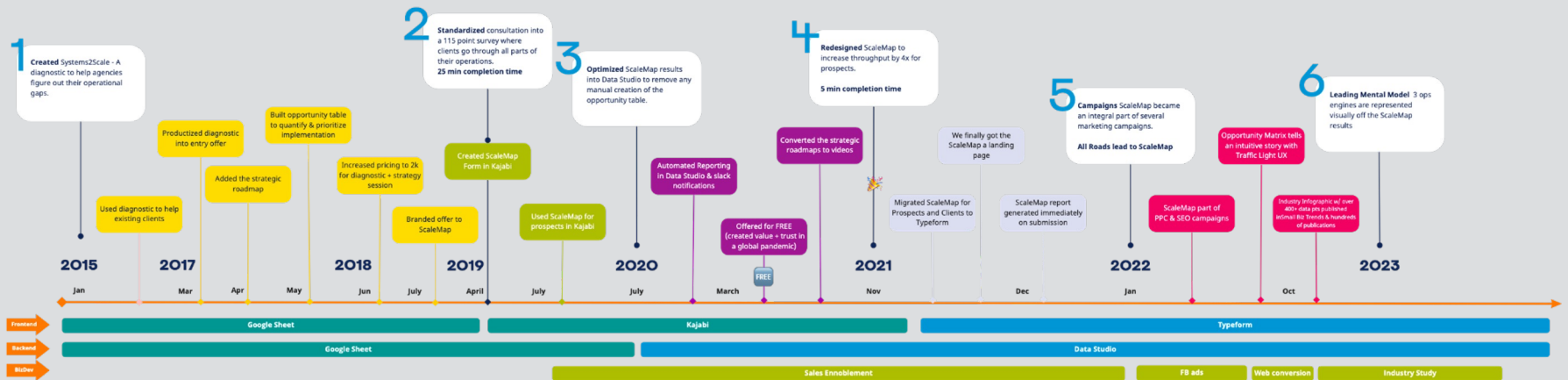


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Questions →

Operations Industry Study with over 600+ Participants



Participate in our Study!

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ScaleMap Diagnostic: Get Your Custom Results in 24 hours

Operational Gaps and Opportunities

Opportunity Matrix

See exactly where the strengths and gaps are in your processes

	Workflow	Tech Stack	Main Documents	Training Material	Metrics in Place	Completely Delegated For Performance	Peer Score for Rev Stage
Sales Process						40%	46%
Client Onboarding						50%	55%
Production						40%	59%
Client Management						40%	41%
Reporting						70%	45%
Hiring Process						80%	53%
Team Onboarding						50%	51%

53%

50%

Create

Standardize

Optimize

Free a minimum of 5 hours a week on average

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50 OPS GAPS

5 MIN
DIAGNOSTIC

5 HRS SAVED

Take the ScaleMap



bit.ly/myscalemap