

# How to Use Templates to Streamline Your Business

Save Time and Increase Efficiency, Productivity, and Quality



**Course Book**

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# Introduction

Operating a small business is demanding and time consuming. Not only are you focused on the actual work of the business (e.g., product sales, graphic design, coaching, or consulting), you are responsible for planning, administrative tasks, internal operations, new client development, communications, and marketing and advertising. Efficiency, time management, consistent quality, and productivity are key to your business success. Templates can help.

Here are the top signs that your business needs templates:

**You are wasting time creating similar documents over and over**

**You are bogged down by administrative tasks**

**You aren't answering questions or responding to requests in a timely fashion**

**Your documents and graphics aren't cohesive, they're unprofessional, and they don't accurately reflect you or your brand**

**You put off long-term planning because you don't know where to start**

**You are spending hours on social media posts, emails, one-off ads etc.**

- You are wasting time creating similar documents over and over
- You are bogged down by administrative tasks
- You aren't answering questions or responding to requests in a timely fashion
- Your documents and graphics aren't cohesive, they're unprofessional, and they don't accurately reflect you or your brand
- You put off long-term planning because you don't know where to start
- You are spending hours on social media posts, emails, one-off ads etc. instead of focusing on the actual work of your business

## Are Templates Worth the Time Investment?

People often put off template creation because it feels like an overwhelming task. They end up preparing documents or graphics on the fly, as needed, without taking the additional time to make them customizable and flexible for future use.

If you refer to the 'Urgent/Important' matrix, templates seem to fall into the category of 'important but not urgent'. Their creation is constantly derailed by 'important and urgent' and 'not important but urgent' tasks. But the case for prioritizing template creation is a strong one.

Taking the time to create templates will benefit your business in many ways:



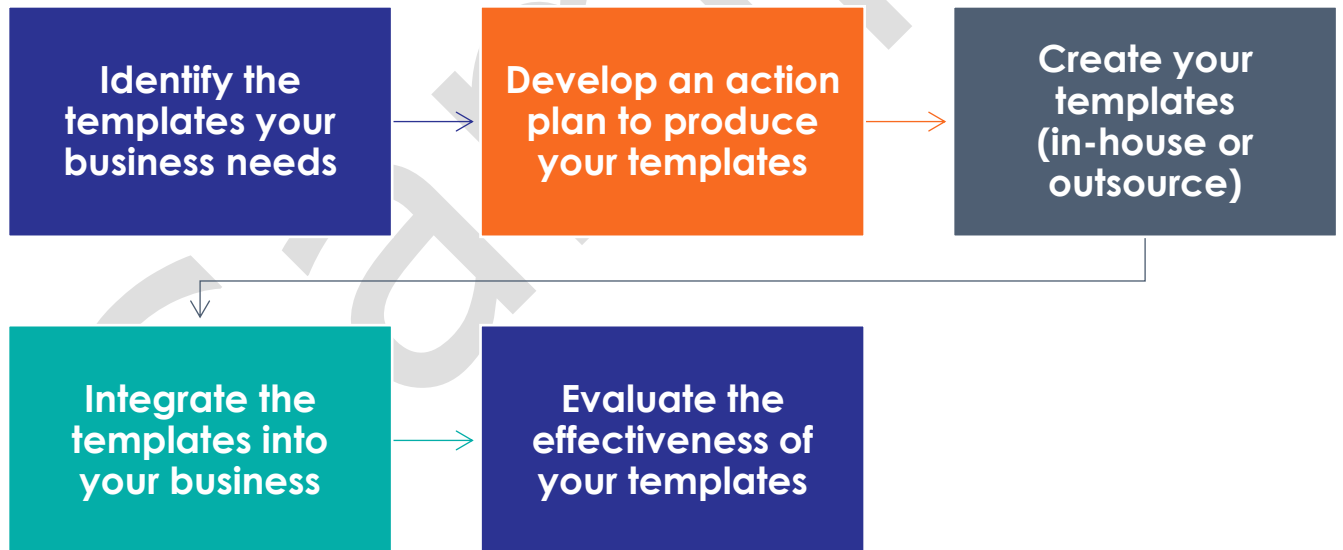
- Saves you time and resources in the long run
- Increases efficiency, productivity, and quality
- Reduces human error
- Produces consistent communications, messaging, and branding
- Contributes to smoother, more seamless operations
- Boosts profitability as a result of all the above

Templates can get a bad reputation. Some say they lack creativity, are impersonal, or are unprofessional (if you use a common, recognizable template). But it's not the concept that is faulty, it's the delivery. You need to make templates your own. Customize them so that they work for you and accurately reflect you and your brand. When done right, templates establish consistency, save time, limit human error, and boost productivity – all while maintaining the critical elements and personality of your business.

What exactly do we mean by a 'template'? A template is any kind of document or graphic with a preset layout, formula, and/or style that is saved for re-use later. They provide the foundation for a document or graphic that can be modified and then resaved with a new name. Templates remove the need for constant recreation of similar documents, saving you time and ultimately contributing to your bottom line.

By the time you complete this course, you will know exactly which templates will give you the highest impact on your business productivity, efficiency, consistency, and quality. Plus, you'll have a clear process for creating those templates. You'll even be well on your way to creating the most important ones for your business, with a solid action plan for moving forward.

### Here is your roadmap through the course:



## Learning Objectives:

By the time you complete this course, you'll be able to:

- Recognize the broad application of templates and their potential to increase efficiency, productivity, and quality in your business
- Conduct an in-depth review of your business processes and tasks, identifying areas that will benefit from templates, so you know where to focus your time and energy
- Identify the long-term planning templates your business needs to transform this overwhelming task into something more manageable
- Pinpoint the internal operations templates your business needs allowing you to reduce time spent on repetitive tasks and increase productivity
- Determine the communications templates your business needs that will help you standardize your communications, reduce stress, prevent inappropriate responses, save time, and increase productivity
- Decide on the marketing and advertising templates your business needs, allowing you to establish brand consistency while maintaining creativity
- Recognize the qualities of an effective template and apply this knowledge to your own template creation
- Evaluate which templates should be outsourced, created in-house, or generated within apps, maintaining a high level of professionalism and brand consistency across all templates
- Establish a working knowledge of template creation tools and online resources to produce an action plan for cost-effective template production

- Integrate your templates into daily business, both for your own and your team's use, so you can start reaping the benefits of templates immediately
- Conduct a template training session for team members that ensures your templates are used consistently and correctly - saving time, reducing errors, and implementing guidelines
- Evaluate template effectiveness and adapt them to maximize their impact, freeing up more time to focus on income-generating activities and business growth

This course is broken down into 5 major modules with individual lessons to take you step-by-step through the process of developing, implementing, and evaluating the effectiveness of your business templates.

The modules follow a logical order, so while you can skip around if you want, it's best to work through them one at a time.

As you go through each module, use your Action Guide to help you complete the Action Steps at the end of each module.

### **Expectations**

Before we start the course, take a minute to think about what you want to get out of it.

In the Action Guide, write down three skills you expect to gain.

Now that you're clear about what you want this course to deliver, we can get started.



# Module 1 - Where to Use Templates in Your Business

**W**hat do you think of when you hear the word template? Calendar templates? Budget templates? To-do list templates? Or the newsletter, sales flyer, or resume templates found in Word? Those are all great examples, but templates are far wider in scope than most people think.

Templates can benefit your business in a variety of ways. In this module, you will learn about the usefulness and broad application of templates beyond administrative duties. With that knowledge, you will conduct an in-depth review of your business processes and tasks, identifying and prioritizing the areas of your business that might benefit from templates, so you know where to focus your time and energy.

- **Lesson 1 – Where to Use Business Templates**
- **Lesson 2 – Review Your Business Processes and Tasks**

## **ATTENTION:**

This is only an excerpt from our full course [How to Use Templates to Streamline Your Business](#). The full, customizable course contains 5 major modules and Action Steps.

When you purchase a license for the course, you'll receive the editable files for the Course Book, Action Guide, graphics, social posts, and other resources.

# **How to Use Templates to Streamline Your Business**

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