Andrew: This course is about how to turn your service into a product so you can break free of the hourly billing. It is led by Brian Castle. He is the Founder of, let's bring up his site, Restaurant Engine, which allows restaurants to get beautifully designed websites easily and without spending an arm and a leg. Brian launched the company after being a freelance web designer and developer. I've invited him here to talk about how he did this. How he transitioned himself into a product I service. He also teaches this and if you want more after you finish watching us here today, he teaches this process in a course called Productize, which you can see on casjam.com/productize. I'll help facilitate. My name is Andrew Warner. I'm the Founder of Mixergy, where proven founders teach.

Brian, good to have you back.

Brian: Thanks, Andrew. Great to be back. I love everything here at Mixergy, so I'm always thrilled to talk to you and your audience here.

Andrew: Thanks. I appreciate it. You were listening back in the very, very early days of Mixergy. I remember talking to you, exchanging emails, and showing your website and different things that we were doing. Different courses and interviews. So it's especially great to have you on here today.

Brian: That's very true.

Andrew: Oh, thank you and I'll try not to keep interrupting you. You know that over the years I've gotten better at not interrupting, but I still do it. The problem we're trying to solve is one that you experienced. And so many other people who are consultants, freelancers, and designers for hire. Experience, which it is. Actually, why don't you tell it? What happened with this client that you were telling me about before we started?

Brian: I come from a background, I started out as a freelance web designer. After a couple of years doing that I just kind of fell into this rut of working or living project to project billing by the hour, and just feeling like I didn't have this freedom or the ability to scale up and build something that was larger than just selling my time for money. Just one memory, and it happened multiple times, but this one thing really sticks out is I had this lead, a potential new client, contact me. At the time I was getting lots of referrals. People just emailed me asking for a website design. So this guy contacted me saying he wanted to build a new web application from this new thing he was starting up. I said, "Great."

I did a couple of pre-qualification questions. He asked me about budget and what not. Once I determined that he sounds like he was a pretty serious prospect, the budget is in line, so let's move forward with what a lot of people call the discovery process, which is

you go through a series of phone calls or meetings, and in this case I did both. I had a couple of long phone calls, and then I met him in person. Now I'm getting out of the office and I'm spending half a day meeting him at Starbucks for half a day here or there. Ironing out, what does he need? What is the scope of what he's looking for? Then I'd go back and write a long proposal. I spent about half a day on that. I sent that to him and he gets it and says, "Oh, I think things changed. I actually want to do a mobile app instead of a web app." Now I have to go back to the drawing board, rewrite this whole proposal, give him a whole new price quote. It just went round and around. By the end of it, I think I had spent 40 or 50 hours, not getting paid for anything. It turned out he flaked out. There was no deal and no contract.

Andrew: No deal for all that work?

Brian: Right. It was a total waste of time.

Andrew: Meanwhile, after you made this transition, you, your wife, and you have a new baby daughter around the same age as my son, you guys took a trip to Acadia National Park. What happened to the business while you were away?

Brian: Well that was fast forward a couple of years. This past August my wife and I, and our baby daughter, and my dog, by the way, we brought the whole family, packed them in a car, and we spent a whole week up in Maine at Acadia National Park. I was able to completely disconnect for the week and enjoy a little summer vacation. Meanwhile, my business, Restaurant Engine, continued to operate. We actually signed up six new clients that week. Got them set up with new websites, did sales, on-boarding, and set up. Happy customers and I didn't need to touch them or do a thing. My team kind of carried it all out and basically the business continued to run without my direct involvement systematically.

Andrew: That's the key part here. It continues to run. It can grow even when you're not there, and instead of you having to hunt down sales that often don't materialize, sales are being developed, processed, and taken care of, and revenue coming in, even while you are away. That's what we're going for here. The very first thing that you said in this process, and there it is upon the big board is to shift your mindset from freelancer to business owner. We talked about this before we started. I said, "Isn't everyone who's listening to us right now, they already shifted their mindset. They're just ready to go. Tell us what to do. Be practical. What's the first step? Why is that so important for us to talk about?

Brian: For me, maybe people can relate to this or not, but I was watching Mixergy interviews and Mixergy courses when I was a freelance web designer. At least for a

year, maybe longer, before I really took action toward building a product and productizing my service. So I started to learn about the things that I would learn on Mixergy and elsewhere. But it wasn't until it clicked in my mind, "Okay, I need to actually start investing my time and energy and focus into working on my business, and not in my business." I had to get out of this mindset of being a freelancer selling my time for money to becoming a business owner.

And that's building up a value proposition and building systems and processes that I can then build the team around and scale up, so that at the end of a long year of freelancing, all I'm left with is my time, and that's really not worth very much. But as I start to build a business, now I'm building an asset that has value which grows over time. That's kind of the mindset shift that I'm talking about here. Working on your business, not in your business. And the point here being, this kind of frames everything else that we have listed here today. You're making your business the project that you're working on.

Andrew: Okay. All right. So the next thing is to start positioning your service as a product. So before we started, I was thinking that what we were going to talk about was how to turn what you do day to day into software that runs without you, and you said, "Actually Andrew, you're not expressing it right." What is the right way to express what we're doing here?

Brian: What we're talking about here when we say productize services is starting with some kind of service, some kind of value proposition, and it very well might still be delivered as a service, manually done, manually delivered, but packaged, positioned, and sold just like any other product that you would buy off the shelf, or buy at Amazon, or subscribe to. What we're talking about there is getting away from billing by the hour, and putting together a predefined scope with a set price, non-negotiable. This is what's included. This is the problem that this service is designed to solve. This is the price tag. Are you the right customer or the right fit for this?

Andrew: So I'm looking at your website right now. Restaurant Engine will create websites for restaurants. But it's not like they sign up, fill in a form, and then they end up with a website that they can customize. No, it's they sign up and then your team of designers and developers and people who you work with will create a website for them, based on the restaurant's need. But somebody or some group of people are doing it, and that's the distinction. It's not software. We're not competing with Square Space. We're doing service on a consistent repeatable basis.

Brian: Yeah, exactly. So this is a little bit jumping ahead, but it's kind of like a done for you service. Restaurants sign up and they get their website designed, launched,

populated with content, all done by my team. It's done systematically, and when we're saying position it as a product, when you go on restaurantengine.com, you can browse around the website. You'll find the price. You'll see exactly what's included, which features and services are included for what price. And that's it. It's kind of non-negotiable.

Andrew: Where was that price? A price you can sign up right there. So you're saying anyone who clicks here can see a standard pricing, just like if it was a product on the shelf of Amazon. Before we continue, why not then turn it into software? Why productize your services as opposed to just creating a software product?

Brian: Again, this is a bit jumping ahead, but it's a really great question. I found that there is a really high value in the done for you aspect versus the do it yourself aspect. There's a lot of great software tools out there that they solve a problem, a pain point and a solution. That's like any good product does, but at the end of the day, the customer, the user still needs to use the product. Install it, set it up, implement it into their work flow. And then they need to use it on a weekly, monthly basis, whatever it is, whatever type of product it is. For example, this week I just signed up for accounting software. I still needed to spend all of last week setting it up and connecting my bank accounts, and it was a huge time to set it up.

Andrew: I see. And you're saying customers value having it done for them much more than value a piece of software that does it. I see. And actually, that's reflected, frankly, in your pricing them back to your web page. If I click on the pricing page, these are higher prices than someone who only sold software for web design would charge. What I thought you were going to say is, "Hey Andrew, not everyone can create software. Software is a very competitive market, and frankly do you want to start entering that market with a finished product, as opposed to entering that market with a service as a product. But then you keep taking the people out of it and replacing more of what they do with software." I thought that was what you were going to say. But now I see it from both sides. Great for you, great for the customer.

Brian: Exactly, and that is the other really big point to be made here. You're right. For folks who are like me, a couple of years ago, I know there's a lot of people out there, freelancers, consultants. You're trying to make that huge leap from billing by the hour to selling a product. It seems like everyone I talk to these days wants to make that transition, but it's so hard, especially when you look at building some big software as a service tool. Software is a very big build and lift to do that. A product has services kind of the path of least resistance in a way. It's kind of like ...

Andrew: Yeah, and how many times have I seen, really, either full time dev shops or

even individuals who say, "I'm going to get into software." And then they get stuck trying to build even the first minimum viable product because it takes a long time. Or they build that and customers expect the next step. And then their developer runs out on them or they have issues with it. You're saying, "This is a different way to start." You're not the only one to have done it this way. You actually gave me an example of a guy named Nick, who did it too. Here's a screenshot of his site. I obviously don't expect people to see it. We can include a link to it in the course notes. But what did Nick do that you're telling us we can learn from?

Brian: Yes. So this is the site of Nick Disabato. He's one of many folks I've been speaking to and interviewing as I've been researching, not only what I've been doing, but talking to others who are doing the productized services and productized consulting. What Nick has done here, his service is called Draft Revise. Basically he does conversion optimization. What his service offers is he'll run one AB test on your website every month. He'll implement the successful result on your website and that's the service. The next month he'll run another AB test, and then another one the following month. It's just a set price like a retainer subscription model. He's clearly defined the scope of what's included, the one AB test and all that. He lays it all out there on his website. So it's positioned as a product.

Andrew: I see. That makes a lot of sense and I can see how he can get up and running with this, how he can build it easily and continue to grow it. You're saying also, only AB testing. He's not also going to redesign your email. He's not also going to install WordPress for you. He's not also going to bah-bah, bah, bah-bah. Only one thing. AB testing. That's what he does.

Brian: Exactly. And if we get back to that whole discovery meetings. I did so many of them where it's like, "Okay, Mr. Client, what do you want? What do you need?" "Well, I want a Facebook app. I want a web app. I want a WordPress." It's kind of doing anything and everything. You don't really have a value proposition. You're redefining what you do. You're reinventing what you do every single time you have one of these meetings. Whereas you look at a website like Draft Revise or Restaurant Engine, and this is what they do. They do this for customers again and again. They're the experts at solving this problem. We're jumping ahead, but if you're that exact ideal customer, then it just speaks directly to you.

Andrew: Let's get to that next step then. All right. So the next step is to find that ideal customer. Before we talk about how to do it, you're saying find the ideal customer before we even figure out what the product is?

Brian: Well, I think a lot of these things kind of happen in conjunction and

simultaneously. You want to take a lot of this stuff into account as you go, and you want to continuously refine it. You might start in one place, serving one ideal customer, then you might learn even more. For example, I've even found that in Restaurant Engine. A restaurant itself seems like a pretty tight niche, but even within that, we started to find, okay, now we're serving a lot of food trucks or now we're serving a lot of pizza and take-out places. So you can even get more targeted within a niche. So it's really about focusing on one ideal customer. You want to move away from working with everyone and anyone, the way that most freelancers do, and get to the point where you've defined and you're communicating this in everything you do. Like, who you're speaking to, who you're serving, and who your solution is really designed to benefit.

Andrew: You could have gone with websites for medical professionals. You could have gone with websites for e-commerce companies. You could have gone with websites for restaurants, in fact, that's what you're ended up going with. How did you pick that? How did you know, of all the different kinds of clients that were out there, and all the different clients that you had, that restaurants were your ideal?

Brian: I kind of landed on restaurants. I get asked this a lot, like, "Did you used to work at a restaurant?" I mean, I did used to wait tables back in the day, but that had nothing to do with it. I was looking for a type of business that has very standardized requirements specifically for websites. I looked at restaurants thinking, well, every restaurant needs to showcase their food menu on their website. Every restaurant needs to show their hours and their location. Many of them need to take reservations online.

This is a standard set of functionality that I can build into a very standardized service, through templates, and a set of functionality. Whereas if we were offering it to a whole variety of clients, like some e-commerce, some portfolio artist websites, or medical professionals, then we'd have a huge line of different options and configurations that we'd have to deal with. Then it's like I'm back to square one as a freelancer reinventing what we do with every single client. It's impossible to scale that up and systemize it.

Andrew: All right. You're not the only one to have done this. You told me about a few other people. Let's go into my browser here. Who is this person who created the site?

Brian: This is Jane Portman. She's a designer and she offers a productized design consulting service similar to the model of Nick Disabato, where it's a monthly retainer, a set price, packaged up as a predictable service. But she targets it specifically at software startups. She works with a lot of SaaS companies and digital software startups. She'll network with these types of people at events and get involved in these kind of communities. That's who she offers that service to.

Andrew: You also gave me another person. Let me bring up again the browser. There it is.

Brian: Philip Morgan, he created his productized offering which he calls My Content Sherpa. He's a writer and again with the retainer model, he will write content for your blog and for your newsletter. He's targeted it specifically at technical agencies. So if you're running a software shop or some kind of technical firm, that's where his writing and his skills really excel and that's the problem/solution that he's offered.

Andrew: We have lots of courses on Mixergy about how to figure out what product to create, so I don't want to spend too much time on that here, but once you find your ideal customer, how do you know what product you will create and systemize for them?

Brian: I think that's right into the next tactic here, which is doing one thing exceptionally well.

Andrew: Here, let me bring up the board. There it is. Right there, to put it in order for us. How do you find that one thing?

Brian: You're really looking for that problem/solution fit, the same thing we hear again and again in all of these courses and elsewhere. Building a product, the way to do it right is to solve a painful problem. The process that I've been teaching to freelancers and consultants as you're starting to productize your service is, number one, look at the range of services that you've been offering yourself as a consultant. Typically it's a lot of different things.

For me, as a web designer I used to do WordPress sites, e-commerce sites. I did logo design, email design, mobile design, all these different things. Then you want to go through that list and identify the most commonly sought after items. Think about those conversations that you had in those discovery meetings, the questions that the clients are typically asking. If they're repeatedly asking for mobile websites, maybe that's a high value requirement that you can potentially productize.

Andrew: I see. Look for what it is that your existing clients are asking you for over and over again, that's similar, that can be systemized, that can be productized, and that's probably what you're going to build first.

Brian: You also want to factor in how valuable is it to the client, or how painful is it. You're looking for a painful problem that they're willing to spend money on to solve.

Andrew: I see. It's kind of a pain in the butt for me to restart my computer everyday, but

I'm not going to pay somebody to do that. I can spend some time doing it. But building a website for a restaurant is critical. It brings in revenue. It allows people to find them and it's something that you can charge a lot of money for on an ongoing basis. I see. You also say to us, be disciplined about what you do. You don't want to do, not even everything that your customers ask for. You had a client, a restaurant who asked you to help with selling bottled barbecue sauce. And what else?

Brian: Like on Restaurant Engine, we had two or three of our customers ask about, "We want to sell t-shirts." "We're a Texas-type barbecue restaurant and we want to sell our bottled barbecue sauce through our website. Can we do that?" That would have probably meant that we would have to build in this e-commerce system built into Restaurant Engine. A very small subset of our customers were asking for that. So I saw that as, it's not really worth the investment in time and complexity to add that. Not only the functionality into website building systems, but also for our team. The extra procedures that they would need to follow to serve a few customers here and there who ask for that. It was just way too much overhead and complexity.

So I decided to say no to those requirements respectfully, offering good support and all that saying, "No, it's not something that we offer right now. We can add a button, and that can point you over to PayPal. That's one way to do it. We can do that for you, but it's not built in." And those customers still stuck with us because they still were getting value in everything else that we were offering them. I guess the lesson there was just saying no to these fringe requests is okay. It's not necessarily going to turn those customers away if the core value is there.

Andrew: By the way, I like how we've not only have the same mic, we also have the same haircut and beard.

Brian: Yeah.

Andrew: That just occurred to me, but you don't play with yours the way that I do. I play with the bottom part when it gets long. I just can't help but get distracted by it.

Brian: I did trim it today for this interview though. It was much longer this morning.

Andrew: Smart move. I try to do it on a regular basis. This thing grows so fast. WP Curve is, again bringing up my browser, a site you want us to learn from. What is it about their process that you think we can learn from?

Brian: Yes. Talking about doing one thing really well. WP Curve, by my friend, Dan Norris, they've been doing really, really well this year, if you're following along with what

they've up to. This is ...

Andrew: They write a lot on their blog about what their process is.

Brian: Yeah, totally. This is really a productized service built up almost as successful as one can be.

Andrew: By the way, this page, for some reason, isn't coming up on my screen. They will even reveal their revenue numbers on an ongoing basis. In December, it was $56,000. That's what I was trying to look at. Sorry, go ahead.

Brian: They're just killing it right now. Basically they offer one thing, and that is customer support for WordPress site owners. That means you can subscribe to their service. I think, currently it's 69 a month. They'll be there with chat and email support to help you out, like installing plug-ins or tweaking your logo on your site or changing your theme. Small tweaks like that, just ongoing support and questions if you're running a WordPress site. That's all they do. They don't do complex redesigns of your whole website. They won't do that. They won't work with your site if it's a Drupal website or expression engine or something else. They only work with WordPress, and they only do small tweaks and support.

Andrew: Let's go back to the big board. The next big thing is to give them the result with no work. What do you mean by that?

Brian: Up until now you're hearing us talk a lot about doing things manually and delivering this service. The question becomes isn't that the same as freelancing or consulting? You're still doing the work. What's the difference? The difference is the systems that you're building. That really is the unfair advantage. You're streamlining this to the point where, we'll talk about it in a minute, you can remove yourself as the founder to the point where the business really runs itself.

Andrew: When you say no work, you mean because the systems allow the company to do all the work, the client has no work.

Brian: Exactly.

Andrew: Unlike software. They sign up for, I don't mean to put Square Space down, I love them, but when someone signs up for Square Space there's still some work involved in creating a website. When they sign up for Restaurant Engine, there's no work. They don't have to figure things out. If they have a WordPress site, yes WordPress is easy, but you still have to some work to do, like upgrade and plug-ins,

maintaining security. They sign up with you. They don't have any of that work.

Brian: Yes, exactly. Thank you. I kind of jumped ahead there.

Andrew: No, that's fine. In fact, I was looking at this piece from your site. What's this?

Brian: With productized services, we're talking about done for you aspect. Right there that's a piece of our homepage where we briefly outline, look, when you use Restaurant Engine, we can get your new site done by this weekend. We'll do the work for you. Step one, you just send us your content, your food menu, your Facebook page, whatever you've got. Step two, we'll get to work. We'll start in-putting that into a template. We'll make a couple of configurations. And then step three, we'll connect to your domain. We do all that work for you while you get back to focusing on running your restaurant.

Andrew: I see.

Brian: I think the idea here is, getting back to the idea of software is do it yourself, and that's fine. A lot of software provides a lot of value. A productized service goes a step further in that it solves a certain problem, there's that pain and solution. But it's like a double edged value proposition where you, the customer, you're not the one doing the work, setting it up, implementing it. You're saving that time and having the expert, the provider implement the solution for you.

Andrew: They don't do any work. You do the work for them. Your systems will keep you from personally having to do it, but your company will do it. Let's go back to the big board. Systems are your unfair advantage. That's what you were starting to say earlier. Why don't we look at this site here? In fact, this is one of your clients.

Brian: Yes. That's a restaurant, one of our customers on Restaurant Engine. They're called Mama's Boy. They're local here in my town, one of our only customers that's pretty close to where I live. Here we're looking at their site. It looks fairly tailored to their brand and customized and whatnot, but it is using a template. One of our standard ones.

Andrew: I did a view source on it before we started and I can see here. You're putting this up on WordPress. There'll be WP content. You're using a theme. It's called the slate theme, right?

Brian: Yes. That's one of our themes that we've designed and we use on a number of our customer sites, but we customize it. We even have a standardized set of customizations that we can make. We'll put in the client's logo. We can change some

colors, change out some content, layouts, and whatnot. Really, the idea here is building these systems so that it's an unfair advantage. When you look at Restaurant Engine compared to, say, hiring a local web designer or local web firm, what they need to do, the web designers, they need to go out and custom design something from scratch, try out different options, and show you different mock-ups, and back and forth. That's many months of work and thousands of dollars whereas we have a standardized way of doing things.

The way that I teach this is, number one, you need to standardize the work. That means settle on one way of doing things, one methodology, and make the work as predictable as possible. At Restaurant Engine we use a set of templates. We always set up sites the same way every time. We make it as predictable as possible, so that it's easy to delegate. It's easy to bring my team on, and they can churn out new websites in literally under a week. We can get a new website from zero to launch.

Andrew: With a new design that looks like it belongs to the restaurant. I asked you before we started, is this just about themes? And you said, "No, you are actually going to start doing email marketing on behalf of your clients. How did you use this unfair advantage when you were thinking about creating that?

Brian: Yeah, absolutely. This is something we're just rolling out right now. We're calling it Marketing Boost. We're continuing on with this productized service idea. It's an add-on service on Restaurant Engine, where we will start to manage your email marketing for you, you being the restaurant. We've had restaurants asking us for this, like, "Can you handle our email newsletters for us?" I had enough requests for that, that I started thinking, "Okay, that's a way that we can really add value and we can do it for them." We have some customers doing this now. We'll write the email newsletter and we'll send it out for them to their subscribers. The way that we standardized this is we're only using MailChimp for this service. If they're already using MailChimp, then we'll use their MailChimp account. If they're using Constant Contact, then we will migrate them to MailChimp. Or if they're not using anything, then we'll set them up with MailChimp.

Andrew: If they insist on using A Webber, you say, "Sorry, we can't work with you. We're only using MailChimp.

Brian: Yes. Right. Exactly. Because it's part of our standard process. This way I can train my team on using MailChimp and using their interface and our template in MailChimp. We can make the same recommendations to all restaurants.

Andrew: That makes so much sense. It's such a hard decision to make, but once you make it, it just keeps you from going crazy. With all these different options and then

someone else has a new email marketing platform that they want you to use and you have to figure that out. Then before you know it, you're not systemized. You're not creating a product, you're creating chaos internally.

Brian: It is also getting back to who is our ideal customer? I'm sorry. It's kind of loud in the other room. I don't know if you can hear that.

Andrew: Let me see. Don't say anything, and I'll look at the levels. No. I'm telling you this road podcaster is a cool mic

Brian: There's a couple of people that are talking. It's pretty loud, but okay. That's good.

Andrew: All right. I'm glad it's not being picked up. I used to use this exact mic, I think it was this mic, in Argentina, where people would talk in Spanish, right outside my door, because sometimes at the end of the day they would want to relax and I would want to record. No one could pick up on it.

Brian: Yeah, it's amazing.

Andrew: What my trick was I would hit the mute button, then I would put them. Wait, I was actually doing that on you. Then I would put the thing up here and go, "Guys, please be quiet."

Brian: That's pretty good.

Andrew: I figured how to say that in Spanish, but I didn't even need to. It was a very U.S. style audience there. They all understood English. It was a professional crowd over there. A lot of financiers were in that office space. Anyway, all I have to say is no problem. You've got a great mic. We're on track. Move onto the next point, true?

Brian: Let's do it.

Andrew: All right. Get everything out of your head and document it. I wish I'd started doing that early on, but I do it now. Talk about what that looks like specifically. What kind of software do you use? How do you document? What do you document? What level do you document?

Brian: The idea here is get it all out of your head and document it into procedures, standard documents, guidelines, and whatnot. I mean, today we're using Google Docs. It really doesn't matter. Whatever tool you feel comfortable with for documenting, as long as it's something that you can quickly and easily use and maintain and share with

your team.

Andrew: This is what your doc looks like. I always think it helps to see a sample of it. You know what? It's a little tough to see on this screen. Would you be able to give anyone who's listening to us a link to one of your docs, so they get a sense of how you're organizing things?

Brian: Yes. Absolutely. I could export one of these as a PDF template that you can look at and include as a link.

Andrew: I'd love that. Tell me what goes into this.

Brian: Here you can kind of get a glimpse of the amount of detail here. What we're looking at there is one of many procedures that we have. This one is titled, how to send a MailChimp campaign for a new blog article. This is a procedure that we use internally. Every week we have writers who write a new article on the Restaurant Engine blog. Then someone else from my team prepares that article as a newsletter, and they send it out in MailChimp to our list. So they're just following this procedure. Step one, they're grabbing the title of the blog post. They're pasting it into the MailChimp template. Step two, grab the excerpt and put that in there. Step three, change the call to action button to point to the article and then schedule it. A long procedure details exactly how to do this so that they can do it predictably, repeatedly, week in, week out.

Andrew: That's all you do? You do blog posts via email? Do you, as part of the service, if the restaurant sends you some content, you'll email that out for them too? Or is it just the blog post?

Brian: Yes. This particular example is actually our own email newsletter that we use to market Restaurant Engine, but the same thing applies to our email management services.

Andrew: I see.

Brian: We've have these standard set of procedures for delivering and creating the email. Basically, to answer your question there, the way that it works is we have a form that we would send to the customers once a month. We call it a content questionnaire form. They fill it out. It's five questions long. What's new at your restaurant? What are some new happenings, new promotions that are going on? What are food specials? Just tell us what's new and then my team can take that and craft the email newsletter and then get it created and scheduled out.

Andrew: I see. And these docs walk people step-by-step through that process. I saw what goes into the subject line? Where do you get the content? You specifically even say copy and paste the content. To that degree you want us to document?

Brian: Yes. Really getting detailed. The end goal, whenever you're documenting anything, is to make the job of your employees, your team as easy as possible. You want to put so much care into these procedures so that when they're following the procedure, someone new, especially if you're training a new employee coming in, you want them to come in and feel like, "Okay, I get this. I'm not lost. I'm not confused." So just give them everything that they need to be successful in their role.

Andrew: Brian, what level of expertise are you hiring for this? You're building websites for people. Are you hiring web developers? I said the word designer earlier and I looked at your face, and it seemed like no, you weren't hiring developers. What level of expertise do you need in order to run this business?

Brian: Different roles require different types of skills. They are designers with some front-end development skills, so our customer support team who handles, not only answering customer questions, but also setting up these websites. They have some basic website chops, writing some custom CSS here and there and HTML. They're familiar with WordPress so they can use our interface pretty well.

Andrew: And are they working for you full-time or part-time, or how are they connected to you?

Brian: Today. we have two full-time support people. Probably adding a third one pretty soon. Another good example is our other teammate who is a part-time sales person, she basically manages our inbound consultations. That's another whole part of the business that I've systemized and made really predictable. This goes back to when I took that vacation in Maine. This is how we're able to bring on those customers without me being involved. As we get traffic and inbound leads who request a consultation, she is the one who calls them up, follows up, and then ultimately on-boards them.

Andrew: I really like this process a lot because I can see how it scales. Ordinarily, I wouldn't think of services scaling. I can see how this scales. I can see how there's clarity for you as a CEO of your company, for what to do with the business. I can see how there's clarity for potential customers. I can see how others can use what they're learning from you, to do it for themselves, too. Let's move on to the final point here. That's to delegate and remove yourself. There's a problem when we start to delegate. You experienced it yourself. What was that?

Brian: I think so many people run into this, especially kind of freelancers who are starting to grow and starting to make that leap into becoming a business owner. You have trouble delegating because it's so easy to do yourself. You look at something as simple as sending out an email blast to your list. You can train someone on how to do that, but you're thinking, "If I just do this myself, I can get it done 10 times faster, so I'm just going to knock it out myself." Then next week comes and you got to do it again. It's still on your to-do-list, and not someone else's.

Andrew: But you do it so well, right? You've done email marketing for years. You can handle it in a few minutes, if that. Why? How do get yourself to stop passing it on to someone else who's probably not going to get it right the first time?

Brian: The reason why you should break out of that hurdle is that you need to be focused on other things, on the bigger picture. Whether it's pushing forward a new marketing strategy or growing the business or improving your system. You need to be working on your business, not the day-to-day nuts and bolts of delivering the service or doing the repeatable tasks. The way that you get started with that is you ease into it. You can start with hourly contractors, part-time remote workers, contractors. Between the documentation that we talked about in the last step and standardizing the work, like we talked about earlier, all of that put together makes it easier and easier to hand this off to someone else.

Andrew: And not have them screw it up and do it worse than you. And in fact, if you document it right, they're going to do it as well as you.

Brian: Right.

Andrew: What's the first thing that you delegated out, using this method?

Brian: In the early days, the first kind of part-time contractor was our content writer, someone to write the blog posts on the Restaurant Engine blog. And that same person ...

Andrew: Oh, that's a tough thing to do.

Brian: ...is still with us today. They do that and then the next person that I hired was a customer support person. In the beginning, the first step was I did do all of this stuff myself. From day one, I was writing blog articles until I delegated that. Then in the very early months of Restaurant Engine, I was doing all of the customer support and all of these website setups myself. I remember really painful days of inputting these restaurant food menus myself by hand. It was like a Sunday afternoon, and I'm just

doing this work, thinking it's going to get me one more customer. I'm just going to do it until finally I got to the point a couple of months into it, when I felt, okay, I'm ready to remove myself from that process and get someone in place so that now that's delegated. Now I can focus on, okay, what's our marketing strategy? How are we going to grow this thing?

Andrew: All right. The web site is, let me bring it up, it's restaurantengine.com. That's where people can see what you have built and hunt around and see a little bit more about how you did it. If they want to learn even more, they can go to casjam.com/productize. Casjam is your personal site and now you're teaching people how to productize the way that you did.

Brian: Yes. Absolutely. Productize is the course that I've been teaching. It talks about a lot of this stuff in much more detail. Of course, right on casjam.com, that's my blog where you'll find plenty of articles and my newsletter where I write about bootstrapping. I do have a free crash course on productizing your service. You'll find that on the homepage of casjam.com.

Andrew: Let me go to that. Actually, before I do, Joanna, we recently did something exactly like what you're talking about. I thought copywriting. You can't productize that. I can't believe she's in this business. It won't scale. It won't grow any bigger. But she's in the information business. Terrific. Then she recently launched a service that will do copywriting for people, very similar to the process you talked about here today.

Brian: Yeah, Joanna, she's one of the case studies in the productize course.

Andrew: I see a case study with her about how she did it, how she turned writing into a productized service.

Brian: Yes, and this was actually a productized offering that they've been offering for a couple of years. What that one is, I think, they were calling it Website Copy Reviews, or The No-fluff Website Copy Reviews, something like that, I think where it was one price, like a buy now button. Anyone can just click that. Basically they then fill out a form, enter their website or the page that they want Joanna to review. Then Joanna will just go and record like a 30 minute screen cast of her going through the copy, giving you feedback, telling you what's wrong with it, and some suggestions, and then sending that back to you. And that's the service, just a one time productized consultation.

Andrew: It's not just her alone. I met this guy, Listen, who is a student of hers in her copywriting course. He is one of the people now. Now that he's graduated the course, he's one of the people who she trusts to do some copywriting work too, and copywriting

feedback like this. I can see how she did it. I can see how you did it. It's really cool to see that this is out there, and frankly, I'd seen it forever, obviously, but I never even noticed that that is what it was. That it was a productized service. Here is your website. Where do we go if we want to take that crash course, as you called it?

Brian: Right there. I think you're showing it in that box.

Andrew: Of course, it's right in front of me. Subscribe and get the free crash course productize your service. It's available on casjam.com. Brian, it was so good to talk to you again. Congratulations on all this progress. I'd really like this process. I'm hoping that someone out there who uses it will follow up with me, and let me know how well it's going for them. And of course, if they want to follow up with Brian, the best place to do it is to go to casjam.com. What does casjam mean? You've had that site for a long time and your Twitter handle. I keep meaning to ask you.

Brian: You know, the name casjam, it doesn't really mean much.

Andrew: It's just your last name, Castle, and then jam?

Brain: My last name is Castle. It actually goes back to when I was a young teenager. Casjam was my handle on AOL Instant Messenger, whatever. So Cas was my nickname growing up and jam, I don't know. So I think I was around the age 18 18, I saw that casjam.com was available. I registered it and today that's my personal blog.

Andrew: Gotcha. Cool. Thank you for being here. Thank you all for being a part of Mixergy. Bye everyone.