



SPI 314

From Clients to Passive Income—Productize Your Business with Brian Casel

April 18th, 2018

Brian Casel: Yeah. This is really that area where it gets ... there's a fear there. I definitely felt it for a long time. I still kind of do. The fear of hiring, it's a financial responsibility ...

Pat Flynn: You're listening to Brian Casel who's actually a previous guest on the show back, way back three years ago in episode 158. I wanted to invite him back to talk more about this topic of how to take your service-based business, something that you do on an hourly basis with somebody. You bill clients, you work with them one on one, how do you take an offering like that and turn it into something that's more like a product, something that can be scaled and automated and that's where this whole fear thing came from because we've had a lot of people ask, "Well, let's bring back Brian to talk more about productized," so that's exactly what we did.

We have Brian back on the show with us. You can find him at productizeandscale.com also, the productize podcast on iTunes and we just have a great conversation, getting into the weeds of how to do all this. How to get over the fees of hiring and being a manager for the first time so that you're not the ones doing the work anymore but you have people do that or software or other tools that can do it for you so that you can get a little bit more time back, work on the bigger decisions in your business or, take some time off and let your business run for you. We'll get into that but first, queue the music.

Announcer: Welcome to the Smart Passive Income Podcast where it's all about working hard now so you can sit back and reap the benefits later. Now your host. One of his goals in life is to meet Elon Musk. Pat Flynn.

Pat Flynn: Hey what's up everybody? Pat Flynn here. Welcome to session 314 of the Smart Passive Income Podcast. You haven't clicked subscribe yet? I recommend you do that right now. In your device, just click subscribe and then you're in because we got a lot of great stuff for you. You don't know who I am? My name is Pat Flynn. I'm here to help you make more money. Save more time and help more people too. To help us do that even more today, we have Brian Casel on the show, who was featured way back in 158 of the podcast, who's

back on now. I invited him back on due to popularity requests. Not popularity requests. I'm sure he's a popular guy but, due to popular request, there we go, I invited him back to talk even more in depth about this topic of taking a serviced based business, something you do with clients one on one, how to take that offering and turn it into something more automated and scalable.

Again, you can find Brian at productizeandscale.com so let's not wait any further. Let's dive right into the interview today. Here he is, Brian Casel.

Hey guys, what's up? I want to welcome back Brian Casel to the show. What's up Brian?

Brian Casel: Hey Pat. Great to be back.

Pat Flynn: Yeah, this is great. I was just saying to you right before recording, four days from now, the day that we record this, is your three year anniversary of when you were last on the show in episode 158. Happy anniversary maybe? I don't know.

Brian Casel: Man, time flies. I didn't realize it's been that long. Very cool.

Pat Flynn: Oh yeah. It's definitely been a while and I know a lot has changed since then. This term "productize", I know we discussed it in episode 158 and obviously I'll link to that in the show notes but I wanted to have you define what that is exactly and why this stuff that we're talking about, is going to be useful for people so we make sure they understand why they need to continue to listen. What is productized even mean?

Brian Casel: Yeah. Productized or productized services, productized consulting, different terms that all more or less, talk about the same concept. Something that I've been very focused on these past few years, both in my actually businesses that I've been building and a lot of what I talk about, write about, teach and all that stuff so yeah. Productized services, I think of as a very focused, done for you service and what makes it a little bit unique from just traditional

freelancing or consulting is the fact that it's super focused on serving one ideal customer, one type of customer and solving one particular problem for that customer in a very systematic, streamlined way.

I talk to a lot of freelancers and consultants who come from the hourly billing model or pricing per project and every product is completely different and it all relies on themselves to deliver the work. Even if they're self-employed as a freelancer, it's still very much like, it requires them to be at their computer, working or doing whatever the service is. A productized service can really be that bridge to building something larger than yourself. Having those systems and processes and focusing on an ideal customer, that then enables you to actually build a team if you want to do that. It enables you to actively market your service, to get in front of more of that ideal customer instead of just relying or hoping for referrals to come your way. Ultimately, it could position you to expand into additional products as well.

Pat Flynn: It's also something that can enable you to start generating passive income because now, it's not all you, correct?

Brian Casel: Exactly. Exactly. I was in that boat. I started as a freelance web designer where I couldn't really take a vacation with my family without basically taking a pay cut and then it got to a point where I had people executing on the systems and processes, working with clients, income is still coming in and we've taken quite a few vacations in the last couple of years so it's been nice.

Pat Flynn: That's really cool. Okay. Do you mind if I give you, just a scenario of a person who might be freelancing and how you might be able to help us wrap our heads around that journey from full-time, billing per client, client meetings and such to a more productized more kind of situation?

Brian Casel: Yeah. Great.

Pat Flynn: Okay. Let's say for example that I am a freelance writer and I help

people create blog articles and I help people just make sure they're getting the right content on their blogs. That's obviously something where I could get people to pay me for that but, if I don't write, then nothing happens. I don't make any money. How might I build that?

Brian Casel: Well, that example is definitely one I know a thing or two about since my main company right now, Audience Ops, is a blog content service type basically.

Pat Flynn: Is it, for real? That wasn't there the last time we talked.

Brian Casel: That's right. I guess that was there a little less than three years ago, is when I started it so I sold my previous company, which was restaurant engine and then started up Audience Ops as like, the "content done for you service" basically.

Pat Flynn: Oh, sweet.

Brian Casel: But yeah. I've talked to, obviously, a lot of writers. There are many on my team and everything. What a lot of freelancers, whether you're a writer or a designer, illustrator, whatever you do, accountant, all these different fields but certainly for writers is, you're probably writing a lot of different stuff, for a lot of different types of clients. A writer might get hired to write blog posts, write social media, write web page copy, write in print magazines.

Pat Flynn: Totally because, when you're writing it and just starting out, you're going to say yes to everything, right?

Brian Casel: Exactly. Exactly. Really, the first step before doing anything is really, to start to just become a lot more focused. Really, that's a change in mindset because technically, a professional writer can write for all those things. You have that skillset but you have to be willing to basically set aside half or even more than half of all that opportunity to really become a specialist in one particular area, whether it's blog article writing or social media writing but then within that, focus on doing that for a highly specific type of customer and really understanding how that customer values that service. What

it actually means to them or their business and then you can really resonate with them on that level.

Pat Flynn: You went through this too when you were doing, just web design for everybody. Then you started to do web designs, which became Restaurant Engine.

Brian Casel: Exactly. Yeah. I used to do websites for universities, doctors and lawyers and portfolios and blogs and all of it, e-commerce. I didn't exactly call it a productized service back then or think about it that way but, I remember my thought being, "Well, if I continue to serve everybody, then I can't streamline this and I can't start to hire people and I can't start to really, even market this thing." My first thought was, "Okay, how do I make it so that every project I do is basically the same?" Like the websites that I build, follow the same set of features? Well, the only way to do that is to make sure that we're doing them for the same type of customer like a restaurant. They all need menus and they all need photos and hours and that sort of stuff.

That's what kind of led me down that path and then that led to really streamlining the systems and processes to be able to remove myself.

Pat Flynn: I love that. We've talked about this before on the show, niching down. The riches are in the niches. Although you've close out the types of numbers you can serve, that's actually a good thing because then, Brian was just saying, you can specialize and become the go-to person. I would imagine Brian, that when you serve that audience well, they would likely share you with other people just like them.

Brian Casel: Oh absolutely. First of all, they know more people just like them because they're in those networks. Even more than that is, when they're exposed to your website or your offer or they meet you in person somewhere and the thing that you offer speaks directly to them, it really gets inside their pain points and the solution and they're just nodding their head, it's like you're reading their mind

because in many ways, you are reading their mind because you know that ideal customer so well it becomes so much easier for them to trust you and for them to trust that you've done this before and ultimately, buy your service.

Pat Flynn: Yeah. Love that. Now, make sure you check out Brian's website; productizeandscale.com. We've got some goodies over there for you guys; productizeandscale.com/SPI. Let's take, for example, this writing example that I was giving you earlier. I'm a writer and I've just been struggling to just say yes to everybody and because of that, I don't have time to do other things so I'm going to niche down, I'm going to follow your advice and perhaps, the writing that I do, the specialization of the type would be show notes or podcasts and the niche would be for fitness podcasters, just because I know there's a lot of them out there. I could potentially target fitness podcasters and offer my services to create some really highly valuable show notes in a way that can help them perhaps get more clients or something like that. Is that along the lines of what you're saying here?

Brian Casel: Yeah. Yeah. That's fantastic. It's then, really easy to find fitness podcasters. I mean, they're literally listed on the internet to go find them and you can go network with them and go to the events and participate and those communities and yeah, absolutely.

Pat Flynn: Okay. I find these people but I'm still serving them individually and it still requires my time. How do I start to "remove myself" a little bit, from offering now, this particular service to these particular people?

Brian Casel: Yeah. First, just a little exercise I like to think about is, just imagine for a second if your ideal client comes to you and they say, "I really need help with making my podcast more engaging and I'm not really sure exactly what I need and budget isn't really a huge issue for me. Why don't you tell me what you think I need." I mean, that's like, the dream scenario for most freelancers and consultants, right?

Pat Flynn: Right.

- Brian Casel: Most of the time clients are saying, “I want exactly this and I want my logo to be bigger and blah, blah, blah,” but, if they’re just giving you that freedom to make your best, professional recommendation for what could improve their business or solve that particular problem, what would that be? That’s a really good way for you to start to put together your best solution and start to build that package of what your business offers for a streamlined, packaged solution, so you can then figure out what is an ideal price point for that, without necessarily billing by the hour but just an easy to purchase, easy to understand, “Okay, it’s got everything that I need. Able to purchase it just like a product off of Amazon.”
- Pat Flynn: I like that because, for the person you’re serving, it’s almost like a menu of stuff versus what it is when you’re freelancing, it’s like a conversation and perhaps multiple calls to try and figure things out. I mean, I remember architecture days where ... maybe this is a poor example but, when you work with a client who is just building something custom from the ground up, I mean, there’s so much conversation needed to help that person just extract what it is they really want and they don’t even know what they really want, versus something like ... I used to work in the restaurant industry, in architecture, if P.F. Chang’s came to us ... actually helped design a few P.F. Chang’s in the US and they’re like, “Hey, we need to create a free-standing building in Spokane, Washington. Do it.” Well guess what, we’ve already done a free standing P.F. Chang’s before so we have those blueprints. Now we just have to fit it into that particular space and follow that particular city’s codes but it’s basically already done.
- Brian Casel: Yeah. That’s exactly right. Just following the template. Maybe having a couple configurable options but that’s basically it. You can make sure that your costs are really predictable, whether that’s cost in terms of your time or the cost of hiring people to deliver the work for you, you can really make all that stuff really predictable. At the end of the day, it saves you a lot of the time and headache and really, wasted time because a number of those people won’t buy and you might spend all this time doing discovery and proposals but for the client too, it’s a lot easier for them to buy. It’s a lot easier

buying experience because when they're hiring a freelancer they have to negotiate over, "Okay, how many hours is this going to take? How much are you billing by the hour?" Really, they just want to know, what is the bottom line and how long it's going to take and when it's all laid out their for them, it just makes it an easier experience on both sides.

Pat Flynn: Love it. Okay. I'm serving this fitness space now and I'm doing show notes and other kinds of things for them. I just have this amazing list of a menu of items they can purchase but it's still me. I want to hire a team. How do you recommend we start to build out a team to start to fill these requests from our clients and our customers?

Brian Casel: Yeah. This is really that area where it gets ... there's a fear there. I definitely felt it for a long time. I still kind of do. The fear of hiring, it's a financial responsibility but it's also, becoming a manager for the first time if you haven't done that before. I mean, nobody really knows how to be a manager until you start working with teammates. Having hired a lot of people over the last couple of years, my advice is to first really streamline your systems and processes before you put people into those roles because I have made the mistake of hiring an assistant when I'm just super busy and I have a lot of projects going on and a lot on my calendar but none of that is recurring. None of that is repeatable. It's not systematic so I could have my assistant do something one day but once it's done, I then have to scramble to give that person something else to do whereas, if I have a system and process that I know always happens week after week, whether it's a new client onboarding process or an invoicing process or it's something like that, then it's just that new person's responsibility to just do that every week.

When I don't have anything else for you to do, you can do that. Really making sure that you have at least a few recurring processes that are ready to delegate when you bring on those first couple of people is really key. Other than that I mean, don't jump directly into hiring full-time employees. There's almost never a need for that right away, for your first people. You can start with part time contractors, hire other freelancers, assistants, virtual assistants,

hire remotely. These are all things that I've really had pretty good success with when I'm not tied down to my own area code here and that sort of stuff. Yeah. I would say just easing into it with part timers and just ramp it up from there.

Pat Flynn: First of all, are you using any tools to help people you hire understand what these systems and processes are?

Brian Casel: Yeah. Really, all of our systems and processes have been documented and Google Docs which, right now in my Audience Ops business, which is that content blog writing service, we're basically processing, it's got to be over 50 blog articles a week, for clients at this point. Having a production line like that, we really need a tight system and process so we have everything documented in Google Docs. Something like 80 plus different procedures in there and then I mean, actually, the software that we've been building and we've been using the past year, we started to really optimize our process and build a content calendar software with recurring processes built into it that adapt to our content production schedule as things move along. We literally built the software to support that sort of process.

Pat Flynn: That's cool. We'll talk more about software in just a little bit because I know you know have a foot in that realm as well but going back to having people do some work for you, I think struggle that a lot of freelancers and consultants and people might have would be, "Well, I don't want to let anybody else do those things because that's my thing. It's my business and nobody can do it in the way that I can do it or as well as I can." How would you respond to somebody who's really hesitant because they just want to do everything themselves?

Brian Casel: Yeah. First of all, there are plenty of people doing what's known as productized consulting where you still are doing the core craft that you think you're best to do, that you enjoy doing and you've optimized, systematized, streamlined all the other stuff to free yourself up more to do that work so that's perfectly, a viable way to go. If you do have that drive to grow something beyond yourself and grow it to a point that it gives you more freedom so that the

business continues to run and earn income and earn a value when you're not necessarily there or even to a point where you could potentially sell the business to someone, even if that's not your intention, it's good to build it that way.

It is important to start to embrace the idea of delegating, even if you're the expert. One way that you can do that is to use your expertise to build the methodology or the core strategy that your client delivers for clients but then that strategy can follow a process. For example, in my blog content service, every article that we deliver to clients is completely unique. It's 100% original content for each individual client but it still follows the same creative process. We go through the same creative process to plan and research process, through the drafting process, through the copy editing process, through the SEO optimization, through the promotion with social media.

We have a specific process that I largely drove early on, to come up with that strategy but then I hired specific people to execute on the pieces. We have writers who draft the articles. We have copy editors who do the editing. We have virtual assistants who set up and optimize the WordPress blog posts and so on and managers who handle the client communication so every one of those pieces has been delegated out and kind of broken into a process.

Pat Flynn: That's cool. I like that a lot. It almost reminds me of Dave Ramsey. Dave Ramsey. He's the guy. He's the personality. He has this system of helping people become debt free and stay debt free yet, he has 100s if not thousands of people around the country who are certified under Dave Ramsey, to teach his exact method.

Brian Casel: Yeah. Exactly. Exactly. Yeah.

Pat Flynn: Why not become the expert that teaches others how to do what you do or execute what it is that your expertise is? I really like that framing. Software. It's interesting because, we have you in episode 158, it'll actually be interesting for people to go back and listen to that and how far you've progressed since then because a lot has

happened since that show. You have this new business, helping people create content, which is great. Productizeandscale.com is new to me /SPI. What it was before was another productized based website but now you're also getting into software. Tell my why. Why software at this point?

Brian Casel: Yeah. It's interesting. I guess, when we last talked three years ago, I think that was maybe right around the time or right before I sold my previous business Restaurant Engine, which was that productized web design service. Soon after that, I sold that business and I was trying to figure out, "Okay, what should I work on next?" My next thought was, I would love to start a software company, software as a service. I was looking at that and I was like, "I've got a couple of ideas. I'm not sure about them but either way, it would cost so much and I would need so much runway to get a new software product off the ground."

We're talking six to 12 months just to get a version one built before we could even get paying customers on it. Even if we did some pre-sales, it's still just a long road and investment and that just didn't seem like viable to me. Instead, I started Audience Ops, the content service and that was able to get up and running, with revenue, within 30 days and grew extremely fast, especially revenue wise. It's a higher priced productized service.

Pat Flynn: Really quick, how were you able to monetize that so quickly?

Brian Casel: Well because it is a done for you service so we don't have to build any custom software in order to deliver the service so any-

Pat Flynn: How did people even know this is something you can offer?

Brian Casel: Yeah. My first step was just to send an email to warm contacts, to friends. Maybe 30 or 40 people that I knew, other entrepreneurs, founders, who would either resonate with the concept themselves or know somebody who would and I think out of those 30 or 40 emails that I sent, that probably resulted in five or 10 conversations, which then resulted in the first three paying customers in the first

two to three weeks there.

Pat Flynn: That's awesome. It went through like, a little validation process there.

Brian Casel: Oh, absolutely. With the service, again, you don't have to build anything custom. You can literally start selling it from the very beginning. We didn't have all of our systems and processes built out yet. We kind of built those out as we went along and built up the team as we went along but yeah. That's the nice thing about the productized service route is, you can get a revenue generating business off the ground quickly. Fast forward a year or two in, this takes us up to a year or three now, now I'm much better positioned to grow into that product position because now I have a profitable business that largely runs without me day to day.

I'm freed up to focus on something and I can reinvest that profit into hiring developers to develop a software product but then the question is, okay, what is the software product and that literally came straight out of the productized service. The content service, I mean, having gone deeply into the process of publishing content on a regular, weekly basis. You start to notice all these little gaps. You're stringing together like, six different tools and it's really inefficient and things are falling through the cracks and you have a specific process that can be automated.

We saw a need for a streamlined content calendar, which enables us to basically sync with WordPress and schedule out our social media and schedule out a production checklist, all built around the calendar so that, if you have something that's scheduled to publish, let's say, on May 1st, you know that that article will have multiple due dates prior to that. The draft is due, copy editing is due and then the blog post is due but if you drag something around the calendar, then all those due dates should shift with it. If you're scheduling socials to promote that new blog post on May 2nd and May 5th and May 20th but then that blog post gets pushed back by a week, you want those social media posts to also shift with it in the calendar and that's kind of the whole concept behind the content calendar

software, which is called Ops Calendar.

Internally, I started building it. I started, basically, validating it with our own team. We started using it first, in Audience Ops but I also showed it to other people. Again, I went to those warm contacts and did some cold validation and before I started heavily started investing into development, I had about 14 people prepay for licenses on the promise that that software was coming a few months later for them to use. That was really like, the kickstart into that over this past year.

Pat Flynn: You had a super lite version that people could play around with before committing to it and getting the fully developed version later?

Brian Casel: Yeah. Actually, early on, I really just showed them the wire frames and designs.

Pat Flynn: Consultants and stuff.

Brian Casel: Yeah. Yeah. I come from that background of like web designer and application designer so I kind of put that together and showed them and put together this roadmap of what this thing will be and that led to the pre-sales, which gave me the confidence to go out and build this as an external product, not just an internal tool.

Pat Flynn: Yeah. I like the idea of going from something like freelancing to like you said, something that could be automated or done more efficiently and then just creating that solution. I think that could open up a lot of possibilities for people, especially the freelancers who are listening right now. However, the big question is, well, how do I even develop this thing? I'm not a developer. How do I do this? Now, I know the answer because I've done some development work, not myself but for my brand. How might a person start that process of like when it comes to software, if a person has an idea for software, where do you even start to turn that into a real thing?

Brian Casel: Yeah. Totally. I had a hard time with this too. I'm like a kind of

technical co-founder where I come from like, a design and front end standpoint so I can design the usability of the app but I can't build a functional backend application myself. I did have to hire developers. I have a small development team.

Pat Flynn: Where did you find them?

Brian Casel: I hired them through Upwork.

Pat Flynn: Upwork. Cool.

Brian Casel: Yeah.

Pat Flynn: I've hired through there too.

Brian Casel: Yeah. It's been working out really well. It certainly took some trial and error. I've gone through the process of hiring people, giving them a small project and really, what I'm testing, aside from seeing if they can execute on the project, really, I'm looking for their communication skill. Can they follow direction? Can they ask relevant questions? Do they deliver on time? Do they keep me updated along the way? Things like that really help.

Pat Flynn: That's great. What were some of the biggest struggles when it came to the software that you're building?

Brian Casel: Yeah, for me, I'm sure every founder deals with this. As a founder, anxious to get this thing built and out the door, if you expect it to take three months, it will take six months. If you expect it to take six months, it'll take 12 months. You just have to double those expectations. Software development is so much slower than you think it will take and that's really frustrating to deal with, especially when I have customers who've paid for it and they're waiting for a product to come out and I have other people interested on an early access list and I'm itching to get this thing out and marketing it and using it myself by feature by feature, you have to get them right and you have to test everything and build something and then rebuild something and those things take time.

- Pat Flynn: Totally. I like again, the idea of software. It's very scalable once you have it built out. You can get people in there and then you can really focus on just the marketing of it and the improvement of it too.
- Brian Casel: Yeah. Absolutely.
- Pat Flynn: When it comes to pricing a software, where did you learn how to figure out how to do that because that's completely different from freelancing or any kind of that stuff.
- Brian Casel: That's a tough one. I'm still experimenting with pricing a bit, on the software. In that particular space, I looked at competitors. I looked at the value. Who are we selling it to? Are we selling it to teams versus individual people? There are different price tiers for those. I have been kicking around the idea of a free-mium, like a free plan versus just a free trial. I've kind of experimented with a few different price points there but it's still pretty early on. We have some customers on it but right now, it's really a process of elimination.
- Pat Flynn: That's cool man. I love to see that you're continuing to experiment and move on to the next phases I think it's really inspiring for all of us to hear. Man, this is great. A lot of good information and I'll make sure to link to episode 158 because we went even deeper into productization but obviously, this is like okay, next step. Super cool. Brian, any final words for ... let's speak to the freelancers out there who are getting a little overwhelmed with the work and there's obviously a limit to the upside there. How can we help them just frame their mind in a way where they can start to think about, "Okay, let's see what we can do to remove myself a little bit, from this?"
- Brian Casel: Yeah. Exactly. Really, I was there a few years back. I was a freelancer, I'm self-employed and I'm kind of paying the bills. This is okay but is this it? I've always had that question; how am I going to grow beyond myself? There are ways to do it. You can sometimes feel like you're trapped in the service that you're offering clients but if you start to think like a true business owner and think in terms of systems and an ideal target customer and what this would look

like if there was a team working under you, obviously, that doesn't happen overnight but if you start to work in that systems mindset, it really is possible to gradually move in that direction.

I mean in my experience, the productized service route, if you're coming from the freelancing, consulting model, that really is the fastest, easiest next step to bridge to then position yourself to then grow into something larger. Yeah.

Pat Flynn: I love that. I also love the idea, for people who don't have any business yet, or who are looking to start something on the side, I always say this, freelancing is probably the easiest way to get started because you can get paid sooner for skills you have that other people want but when you approach that with productization in mind, you can ... yes, it's going to be very active at first. Nothing starts in the passive realm but, you can get there a lot quicker by just understanding what Brian's been talking about today as you approach your new freelancing job in the future. Dude, again, super cool. Brian, hey, where can people find out more info about you?

Brian Casel: Yeah. This was awesome Pat. Thanks again for having me on.

Pat Flynn: Of course.

Brian Casel: Yeah. Productizeandscale.com. That's my site. That's where I write my newsletters, my articles. I have a podcast there as well, Productize Podcast but I do put together, I do get these questions all the time about productized services. I wrote, literally today, I wrote up a new document to how they apply in 2018 and beyond. That's just for the SPI audience so if you go to productizeandscale.com/spi, that's where you can grab that.

Pat Flynn: Cool Brian. We appreciate you and best of luck.

Brian Casel: Yeah. You bet.

Pat Flynn: All right. I hope you enjoyed that interview with Brian Casel. Again, you can find him at productizeandscale.com, Productized Podcast

and make sure you check out that link. He's made this stuff just for you. Productizeandscale.com/spi. Of course, the links are always going to be available on the site, on the show notes, which you can go to at smartpassiveincome.com/session314. Just going to make it easy for you. Smartpassiveincome.com/session314. By the way, just Brian, I know you listen to the show as well, thank you for your time and your wisdom today. I hope everybody just enjoyed Brian and what he had to offer because I learned a lot through that process to. Thank you so much. I appreciate you all listening in.

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