



**SPI Podcast Session #210:  
How to Automate Your Business to Save Time and  
Make More Money with Dana Malstaff**

Pat: This is the Smart Passive Income Podcast, with Pat Flynn session number 210.

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, he secretly wishes he could be best friends with Ryan Reynolds, Pat Flynn.

Pat: What's up everybody? Thank you so much for joining me today in session 210 of the Smart Passive Income Podcast. My name is Pat Flynn and I'm here to help you, by bringing on amazing guests like today's guest Dana Malstaff. She is amazing; she is the CEO and founder of Boss-Mom at [Boss-Mom.com](http://Boss-Mom.com).

I recently connected with her again, because she and I have known each other for a while. She was actually a student of me and Chris Ducker's [1-Day Business Breakthrough](#) event, and she was sitting in the hot seat. She talked about where she was, and wasn't clear what her direction was.

Now, almost a year later, she's made massive changes in her business and is doing so many things in alignment with building a raving fan base, and also automation, which is going to be the main topic of today's show, automation. How to take these things that you're doing, and create systems behind them, so you can do more, or open up free time, or both.

Dana's here today to talk all about that, so I'm really excited to bring her on, so let's not wait any further. Here's Dana Malstaff from boss-mom.com. Here we go. What's up everybody I'm so happy to welcome Dana Malstaff on the show today. What's up Dana, how are you?

Dana: I am awesome, how are you?

Pat: I'm doing well, it's great to talk to you again, we've crossed paths a number of times. The last time I saw you, was actually at the Traffic & Conversion Summit, the IM party the night before. Even before that, you were a student, at one of me and Chris Tucker's 1 Day Business Breakthrough events.

It was great to hear what you've been able to do since then. I mean I don't know how much you've grown, but you've grown some number x, like 5x or whatever. You're doing amazing things and that's why I wanted to have you



on the show. First of all, welcome and if you want to really quick, introduce yourself to everybody and what it is that you do, that will be amazing, and then we'll take to from there.

Dana: Yes. Well thank you by the way, you make me sound awesome which I always love.

Pat: Which you are.

Dana: Yeah. I am a business and content strategist for the Boss Mom, so I'm the author of the book Boss Mom: The Ultimate Guide to Raising a Business & Nurturing Your Family Like a Pro. We have the Boss Mom Podcast, we have the Boss Mom Movement and Community, we have the Boss Mom Academy. We've basically boss mom-ed everywhere you could possibly boss mom.

It's basically for work at home mom entrepreneurs who don't want to feel guilty about loving their business, and loving their children. It's this idea that, being a parent isn't about sacrificing our life for our children. It's about showing our children what a good life lived looks like, so that it can inspire them to be the next generation that lives through their passions.

That's what we do; we do that as a community. Then as a business, we actually help drive them towards growing their businesses, creating multiple streams of income, figuring out how to actually take action in the in between moments. Because, not all mom entrepreneurs have eight hours every single day, to get done what they need to get done. Helping them grow a business in a way, that gets them to feel really excited about growing something that financially gives them stability, while not sacrificing their family goals.

Pat: I love that. Although it's very clear who your target audience is, I think the message is universal between all ... Between both genders because this is something that everybody deals with. It's how do you balance that work with personal life, something; I know I've talked openly in the past, and have openly talked about how much I've struggled in the past as well.

I'm curious like where do you stand on; because I think a lot of people, they think it's one or the other right? You either sacrifice that business idea you have, because you want to spend all your time with your kids, and raising them or vice versa. Quick in one minute rundown like, what that ... How do you approach that, what's the right way to do it?

Dana: Well there's a couple things first, I talk about in the book. That I used to think that, loving my business meant that I was taking away from my love of my children. When you start to shift your mindset to understand that love is



limitless. In the sense that you can be passionate about so many different things in your life, and it doesn't detract from the other things, it just accentuates your ability to be loving and passionate.

Time management is a whole different thing, you have to pick priorities about what time you have, so I came I with what I call, the One Bucket Method. We do this idea where we put all of our priorities and our ideas for our family, and all of our priorities and ideas for in our business. There are two buckets, and there's only one of us. We end up having multiple full buckets and not enough time and just a lot of stress and anxiety.

Well if you take all of that out, and you use the one bucket method, which is where you have to assume that every single thing in your life is just part of one life. Like there is no work life balance. It's a phrase that seems so alienly strange to me, because how is work and life different and separate from each other?

When you do something that's what I refer to as sort of conscious integration. You understand that all the things you do in your family, the things you do in your business, can feed into each other, can help each other grow, can be learning lessons for each other, can integrate into maybe how you involve your kids in your business. How you find those in between moments to manage your business. When priorities sometimes lean towards family or lean towards business, and you put it all into one place such that all is one hole.

I think then you start to really understand where your priorities are, and how you're going to manage those. It gives you that foundation to be able to move forward to set your time boundaries, in an appropriate way to really help grow your business, and your family, whichever ways you want.

Pat: I love it. The book is called Boss Mom: The Ultimate Guide To Raising a Business & Nurturing Your Family Like a Pro. I love that, I mean a lot of people who know me, you know me that's ...

Dana: I do yeah.

Pat: ... I'm all about that. That resonates very well with me. I appreciate the actionable advice, in terms of how to wrap your head around all this. Because you're right, the "balance" thing, it's when you think about, a scale for example its only perfectly balanced at one moment. It's never there, and if you fight for that all the time, you're just going to be unhappy all the time.



Really it's about making sure it's not too far one way, or too far another. I love one bucket method, I think that's great. Now I know that you've also been growing your business, and helping others grow their business too, so let's talk about that.

I mean when we met at IM party, a couple of weeks ago, you talked about how you're learning how to automate your business. That's of course, very much in alignment with what passive income is all about. How to use different pieces of software, how to use other people, to be able to grow and manage your business without you actually having to trade your time one for one for the income that you generate.

How are you automating? You said this is kind of new for you, you're adding new things into your business, like what is exciting to you in terms of automation right now?

Dana: Oh yeah. Well first, I've become an automation junkie. Well once you jump on the band wagon of automation, you're going, "Why have I not had this in my life?" Just like with your team, like once you give in to having your VA, and then having your social media manager, and all the people that can help you in your team.

Everything you do, you're like, "Can I automate this, can I have somebody else do this, like do I really ... Could I make more money not doing this, than I could doing this?" Then you start going, "Yeah I could, okay wait take that off my plate, I'm going to give it to somebody else." Your business grows that way, because when you have time to do what you do really well, you're going to make more money doing that, and letting other people do it.

For automation for me, I invested at the end of last year in [ONTRAPORT](#), which I'm in love with. I tried [Infusionsoft](#), it was not for me. I think more of the creative entrepreneur would lean towards Infusion or ONTRAPORT, that's just my preference.

That has really allowed me to automate, so many of my processes, so many of just the intake of people that want to be on the podcast, want to be you know guest blog, want to be the boss mom of the week. All of those things get automated.

Pat: It sounds a lot like admin type stuff, that's being automated through this process.

Dana: Oh it's like having an assistant. Absolutely. Because before someone would want to be a part of the movement, and they would connect with me, or my



VA. We'd send an email back and forth, and we do ... You're just repeating things.

What I recognized in automation is, and I think so many people think that automation is just, taking a process and putting it in a place, in a way like through ONTRAPORT, where you never have to touch it again. I also feel like automation is anything that I do over and over again. If you can find any way to make it simpler, make it happen quicker.

If you're shortening the curve of how long it takes you to do it, or implement it or anything like that, then I feel like that's toward ... In the vein of automation. Anybody who wants to work with us, we do it that way. You know all of my clients I have, I use [Trello](#) as my other, I call it my work wife.

I'm in there, all of my clients, we each have a Trello board, and every single time it's the same exact board, and I do it the same exact way. I have an entire process and links board, so everything I ever use and repeat over and over again. In terms of bios, and things I need to send people, or emails that are consistently the same kind of emails, out to like be on the podcast, or things like that, they're all there.

Like all of my referral codes, all of my ... Anything like that, I just go in, easily take it out or my VA takes it out, or whoever's on my team that's needs it, and it's all there. Taking things that I just used to do, over and over again, and now I feel like I've got at least like two hours a day, where I'm just not doing all of that stuff.

Pat: That's huge.

Dana: Yeah and every time I think of something new, I seriously ... Like before I do anything now, I'm like, "Could I have somebody else do it on my team, that can do it probably better than me, and faster than me, or can I automate it?" I usually find, that like at least once a week I'm finding a new thing, to automate.

Pat: Actually for those of you listening, this is actually just a voicemail that I'm playing, from Dana, because she automated this entire ...

Dana: All right I'm not that good, yet.

Pat: I'm just kidding. No, but that's amazing. How does one go about starting automation? I think this is obviously a great concept, but like putting rubber to road, like how do we actually do this, or how do we know even what to automate?



Dana: Sure. I think the very first thing, for me is thinking about, what are the things that you do repetitively. If I'm constantly getting people that want to be a guest post, or constantly getting a call from a client why I'm doing the discovery process, the same way every single time. If there's something you do consistently the same, it can be automated.

Some things can be automated where you just never have to touch them, and they work the way you want them to. Some things can be automated where you just like I said, simplify the process, so you know you're just pulling that content and repeating it over and over again.

I think systems like ONTRAPORT or Infusionsoft, give you the ability to truly automate, in the sense that you don't even have to touch anything. Like if somebody comes in, has a request, it like sends me a task, and I just say yes or no. If I say yes, it sends them an email, and if it says no, it sends them an email. The whole thing's like truly automated.

If you just think about what it is that you are doing repetitively, what email do you find yourself writing, over and over again. Save that email somewhere, you know I use Trello, but you can use [Evernote](#), or whatever works for you. Save that, so that it's easier to get to, and you're able to then, just streamline that process.

As you grow your business, then you can start investing in tools like ONTRAPORT, to really maximize, I think the abilities that you have. Then you can start getting into the kind of automation that I'm getting into, which is like abandon cart automation.

If people are, going to my sales page, but they're not buying, then I can reconnect them in different ways. I'm now plugging, profit leaks, which my business coach, Dawn Marrs, of Marrs Marketing, I know you met her. ONTRAPORT is her area of expertise, and those are some of the things where she's, like I consider her to be like the profit leak woman. That she just shows you these places, that you're losing the ability to pull people in and nurture them.

Pat: Yeah. Leak is a great word.

Dana: Yeah is helping me plug those leaks, through automation and different processes. I think you can start small though, just think of the things that you do repetitively. Figure out how to make those easier for yourself. It's going to free up time, so you can do what you do well, to make more money, when you make more money, you can invest in the products that help you plug the



profit leaks, so you can make more money. Then it just sort of perpetually grows from there.

Pat: Yeah. I mean we live in an amazing age now, where there are these tools available, or even other people available to help us plug those holes. I definitely think, really what it comes down to, is just being conscious about what those things are. I think that's where the big struggle is for a lot of people.

I mean it's easy to hear somebody say, "Oh you just got to find out what you do repetitively." Often times we go through the motions every day, and we don't even realize what we're doing, over and over and over again. Hearing from others like, "Oh you can actually automate that." Is really interesting.

What are some surprising things if any that, you've been able to automate, or just a few ... Maybe just do the laundry list of things that you have been able to automate. Those of us who are listening, "Can be like, oh yeah I could do that, or I could do that or, no that's I don't do that, but maybe I should." You know that sort of thing.

Dana: Yeah. Well so from a Trello standpoint, because like I said I put everything in Trello. All of the things that I need to get done in my business on a day to day basis, go in there.

Pat: Which are?

Dana: Like I've got my process and links file. Every time I see something that's interesting to me, it's like kind of ... I think of Trello as Evernote and Pinterest had a baby, which is great. It's the visual thing, but it categorizes things a lot better.

I'm going in and I use my swipe file is there, so my whole team can access it, so to me part of automation, is giving really great access to my team. Because it's going to take more time for me, if I'm hoarding information, that my team can't get to. It's going to take me more time to disseminate that.

If you're creating a system, the part why I love Trello is, it gives you the system that, kind of allows your team to access it, in a simple way. Then you can track kind of how things are working for you. We have, like I said, all my referring of things that I noticed that I was doing, is.

You know I've got an Amazon affiliate and I was going in and looking up my Amazon affiliate links for things. Like my book, I go in to my ... I relook up my Amazon affiliate link for my book. By the third time I was like, "Why I'm I



doing this, why don't I just put this link in a place where I can get to at every single time?"

Pat: Yeah.

Dana: Once I've done something a couple of times, then I'll go, "Why did I just write that email three times like I'm ... This person, is a similar person that I talk to all the time, why don't I automate that." Like I said like all my discovery calls, I've automated that whole process.

What I do, is when I think about something that, you know I think about what I do in my business. Like I'm going to get up in the morning, who I'm going to talk to today? I'm going to talk to maybe women who want to be in the Boss Mom Academy, I'm going to talk to maybe the potential affiliate partners. I'm going to talk to maybe moms who want to be the Boss Mom of the week, maybe I'm going to talk to people I might collaborate with.

Okay what I'm I going to do with those people during the day, like how I'm I going to communicate with them? Is it something where consistently I'm going to communicate in the same way with them, I can automate those things. I just start stepping things back you know; I just back it out, until I get to the spot where I go, "Yeah okay these emails are consistent."

Then what I can do, is spend a minute or two, saying, "I'm going to be conscious now, pull up a couple of times I've written this email and just write the master email for that. I'm going to think about the way I do this process." For instance one of the things we have, that we use in Trello is, we have a checklist for the graphic designer, for the person who has show notes, and for me, for our podcast and blog.

It's something where we just copy in, so it drops in the same checklist every time but we created this simple checklist, to say, here's the things we each have to get done. We can tell, by how things are checked off, whether the next person will do what they need to do or not.

We've automated that process so that all, that has to happen as it takes about two seconds to drop in that checklist; to the next person that's coming up, that we're going to be working on. We can all check off what we need to do, nobody has to think about, you know it doesn't take any time to think about what has to happen, we've already done that.

Now we've freed up that time, to not think about what has to happen, but to be able to actually execute. I think that's the biggest problem with





entrepreneurs, is we spend so much time, trying to figure out what we should do, and how to do it, that we don't have time to do it.

Pat: I love it. Then what about automation in terms of what happens within your business, so somebody for example subscribes to your email list. Can you talk about, how automation works in your favor, at that point?

Dana: Yes. This is why I love ONTRAPORT, because it allows me to put them in all sorts of different places, you know I call it my nurturing system. I have my Trello optin right now, so which is doing really well. If somebody comes in and they say, "Yes I want to learn about Trello, I've optin."

It basically just sends them an email and say and puts them on a sequence, which is kind of like a list. It says, "Okay great you know what, here it is, here's the optin, I'm so glad you're on there." Then there's a series of three emails that go right after that, you know day after day. It's a step sequence, which basically means it's just happens in a particular sequence as soon as they optin.

Then it goes through a sequence, that nurtures them to say, "Great here's Trello, and here's how it's relevant to your business. Its relevant to your business in this way, and here's other content that I have, that's relevant, that's interesting."

It basically goes from Trello, and after a couple emails, it drops them into my, About Me. Like learn about me, get to know me sequence, which then does more of like my story, and the Boss Mom story. By the time I get to the point where I'm talking about, my products and services, they feel like they know ... I mean it's pretty standard, I did not invent this by the way.

Pat: You're right.

Dana: All these things naturally just happen, and what I love is in the automation sequence. I understand if they're clicking on things, I've set up automation so if they're clicking on particular links, it tags them to put them in other places. If they're clicking on a particular link that shows their interested in creating online course work, I have a course to teach how to create an online course.

Now it puts them to sequence to give them emails about the online course, so that they ... Because I know they're much more likely. It's content that I know that they're interested in. Through this automation, I'm able to own in on giving people the content they actually want, instead of blanketly, giving people a bunch of content.



That's just worked wonders for me and I'm relatively new, to that whole sequencing, nurturing system. Oh my gosh, people that get on the webinars and talk about how it works. It really does work

Pat: Right. It does work really well. I mean I implement a similar system using ConvertKit. I actually came off of Infusionsoft too, because it's just was a little bit too much for me. I found the same exact results. I mean people really do feel like you're speaking to them because, you've been able to, with automation place them exactly the place they need to be, and get only the emails that they need to read.

I think that's great, and I love the way you process that. You're giving away a ton of value, you're talking about that thing, that you're just giving away the Trello, how you run your business using Trello lead magnet, which actually we're going to give to everybody right. Like we have a link for that.

Dana: Yes.

Pat: Boss-mom/SPI, I believe you wanted to ...

Dana: Boss-mom.com/ ...

Pat: .com/SPI, excuse me. You can get that free training there, and go through the sequence and see what it's like. I love how, you don't go right into who you are, you're still on, in those first three emails, the tool that they are interested in. You know they're interested in it, because they downloaded that tool. You tell them how to use it, and how it's beneficial for them, so providing even more value.

Then, you're telling them about you, you're building that relationship and that trust, which is obviously very important. Then by the time you get to the end of that, it's like, "Hey, Dana's giving me all this great information, I know Dana, like I feel like she's like a really cool person, and I want to work more with her. Boom here's all this other stuff that she's offering, let's get into it." Again, like all that's happening behind the scenes without you actually having to lift a finger right?

Dana: Yes. Then you can go on and you can just tweak. I think what I love about automation, is like I was saying, we spend so much time trying to, figure out what we're going to do in our business, and even then try and implement that. That you don't get to tweak.

I think entrepreneurship is all about tweaking. You know you've got the 80% of things that don't work, and the 20% of things that completely rock and



jettison your business forward. If you're not able to spend time on that 20%, to really tweak it in the tiny way it needs to be tweaked, to make it amazing, then you end up kind of being stagnant.

By automating, you're giving yourself that freedom and that time freedom to tweak those things, which I think is really amazingly helpful for growth. That's ultimately what we want. I also talk about, I do a lot of Periscopes and everything, and I talk about this idea, that you can't grow your business, by just adding on.

By figuring out things to automate, and things to maybe have team members to take off things off your plate. You're able to then grow, without feeling like you're just adding more. Like you should be able to grow, and other things fall way to other people, to more automation you know as you go.

Otherwise, you got, you're like, "Wait a second, I'm growing, I'm making this extra money, and I'm working 90 million hours a week. Like this doesn't work." What you want to do is, you want to make more, and being able to work less. The only way to do that, is through getting good support through a team and having automation.

Pat: Having automation, and be conscious about, what it is that you're doing and what is working what's not.

Dana: Oh absolutely.

Pat: I love that. Now I know, that automation, is not supposed to be used in other situations as well. For example, when trying to nurture your community on social media. I know there's a lot of automation tools out there for social media specifically, that help us schedule posts and things like that.

What are your thoughts on, automation with social media, which is supposed to be more conversational social place, but a lot of people end up abusing the power of some of these tools?

Dana: Sure. This is how I automate, so I'll do full disclosure. I have somebody who, schedules all of my posts that have to do with content. They go out and they take, you know we've got the boss mom of the week, we have the podcast that comes out ... That's now coming out several times a week, and sometimes we have guest posts that come out.

All of those things that get set in to, we use [Buffer](#) at the moment, but we're kind of moving over to [SocialOomph](#). We have them in place, and she puts



them in, so it's running multiple times and you know in the way that makes no sense for different social media that we're on.

Pat: Right.

Dana: She does that. Then she also goes out, and she finds really great articles, you know like your articles, for instance, and puts them on there as, hey we love these articles we want you to go read them. She does all that scheduling. Then I also have somebody, who goes into my Instagram, and my twitter, and they go and they follow people, and they like people, and they make comments.

At the very beginning, I used to think that, "Gosh if I'm not the one going in and saying I like that picture, then it's not really authentic." Here's the way to works for me, I don't have time to do those things, so if I have somebody else do them. Actually they enjoy doing them and they're like, "I can't believe you're paying me to go and like people's pictures."

They go and do that, and when the person comments, I see that comment and then I can engage. Either that engagement never happens, because I don't have time to be in all places at once, or I get people to help me to find the right people to engage with, so that then I can engage in a way that's meaningful.

Pat: Okay.

Dana: I don't think it's inauthentic. I think I'm getting somebody to help me get ... It's like saying, "Oh I'm going to run a marathon, but is it inauthentic to have somebody train me? Because I feel like I've got legs, I should just kind of run a marathon." That's obviously not true, like it's going to be much harder to do it, and you may never even sign up, if you don't get the right support.

I find having the right platforms to help me, and having the right people help me, get to those things, so I can engage in a meaningful way, and have time to do that. Is the best way for me to serve my audience.

Pat: It's kind of cool. You have a team that helping you; almost filter out those who don't even really want to have a conversation anyway. Through all of that you're able to eventually see conversations that you should have.

Dana: Oh yeah absolutely. They know all the hash tags and things that I, don't want to spend the time doing. They'll find people that are actually really great or like sometimes they'll find people that I'll engage with, and I'll be like, "Oh my gosh you need to be on my podcast, like come on up, let's have a chat."



Pat: That's really cool.

Dana: We end up collaborating together, or they end up being a client, or I end up being a client of theirs. You know so there's a lot of great engagement, to be had. It's just getting you know the right tools, and the right people to help inch you towards the ability to be able to engage in that way. Some people when you're just starting out, you are going to get on, and do all these things yourself. Sometimes that's just the way you start out.

Pat: Yeah, I mean you should, I think.

Dana: Yeah. As soon as you get it, and know it, and understand it, and you can afford it, then hand it off to somebody who can do it, just as better. You know just as good as you, better in fact, so that you can be freed up to engage in ways that really helps drive your business.

Pat: I love that. I want to shift the conversation a little bit to, education. You know you were a student at me and Chris Ducker's 1-Day Business Breakthrough event. I also know, after listening to you on Hal's episode, that you also participated in [Best Year Ever](#) live, through Miracle Morning and Hal Elrod.

It's cool to see somebody who's, already successful still learning, and still going out there, and trying to up the game. How important is learning to you? I mean it's hard to again, there's that word balance, to learn and also execute, but how do you approach learning, and then how do you balance learning versus execution?

Dana: Sure. Well I always, know what I want to get out of what I'm going to learn. For instance, if I'm going to you know, the Best Year Ever, I'm saying, "Okay great, here's the people I want to meet, here's what I want to get out of it." Whether its maybe new clients, or new collaborations, or I'm getting to know how better. All of those things, what do I want to get out of that education?

For working with you and Chris Ducker, I went in going ... I really want to get on this hot seat, which I did. I was in this spot where I was, starting to write my book, but I wasn't really sure how it was going to fit with my brand and all these things. I knew exactly what I needed. I don't get education for education, I get education because I know what I need, and I find the right education to help me get there.

I think a lot of entrepreneurs are in constant learning mode. I think some of that for ... I had this in the very beginning, some of that is fear of actually



making the wrong decision. Because ultimately, you know making a decision, like quite literally is limiting your options, and that's a scary idea, for us to say, "Oh, I got to make a choice."

If you don't make a choice, and you don't move forward with something, and you're just perpetually in education mode, then you're really not an entrepreneur, you're just a perpetual learner, or you know hobbyist.

When you take action, and then inevitably something doesn't work and it fails, or you learn from it, or something succeeds. You're never going to know until you take action, and that's not a new idea either. When it comes to education, I absolutely invest in education, like there's a lot of things that I invest in, for education.

Pat: These aren't cheap like they ... ?

Dana: No.

Pat: These are like high level, you're going to the top in terms of learning, from high end people here. I mean so you're spending some money on it for sure.

Dana: Oh, I'm in it to win it. If you're going to do something, then you do it well, like if I'm going to spend a whole day with a group of people. Then I'm going to spend a whole day with a group of people, who are really going to actually help me move the needle forward.

I'm very conscious about where I spend my time. I have two kids at home, I've got a toddler, and I have a seventh month old. When I went to, Hal's Best Year Ever last year, I was pregnant at the time, so I'm very conscious of where I spend my time especially on, in after hours. It has to really be, something that I know is going to be effective, and helpful in my business.

If it's not, then I do one or two thing, either I say, "No, just not going to do it." There's another thing, you've got your team. I've had my team take courses for me, I'm like, "You know what, I don't know Pinterest, I don't really know about it, I don't know how it works. Here, I'm going to take this course, and I would like you to watch this course, learn it, and come back to me."

I've done that with Instagram and other things to. I don't feel like I need to do this right now, maybe at some point when I have extra time, but it's better for me, to grow my business in a certain way. I'm going to get this course, have you watched this course, learn everything you need to, and then you could tell me the important parts, and I can watch you execute it.



I've done that as well. I don't do that with the really expensive high end courses, because if I'm going to invest \$1000 in a course, like I took Amy Porterfield's [Webinars That Convert](#). I'm going to obviously do that myself, so I can execute that in my business, because there's a big money return that comes with that.

Pat: Right.

Dana: The smaller things, now that I have a good team, I have them help me in those places. They can tell me, "Hey by the way, video three, you should watch this." Then I'm kind of narrowing down, how much time I have to spend to get the maximum effect from the things that I purchase.

Pat: How did you find your team members?

Dana: Well I really like to have team members that are my ideal client. That's my personal belief, that the best thing you can do, is have the people that you think you can serve best, to work for you. Because, I think that they come up with the best ideas for your business.

I reached out to the boss mom community, once I started to build that. I actually had, NJ Rongner is now my co-host on the boss mom podcast, and she had been on the podcast before. We had such a great time together, and she does, has a really great blog, she's monetized the blog, has a good mom blog, sort of segment of the population, which I don't have.

Basically when I found out she did VA, sort of digital strategist work, I was like, "Come on board." She gives me the best ideas, like when you have someone who's your ideal client, that you find from your community, to be on your team. She not only does what I need her to do, she comes to me and says, "Dana, I think you should be in this area" She gets on social media and talks about me, and you know comments about me, or says, "Hey, I think this will be a great idea for your next book, or I think you should do this, come over here and do this."

I mean it's just amazing, they like actually come up with ideas, that I go, "Wow, I probably would never have thought about stuff, thank you for telling ... Yes let's do that. Can you do that for me? Great you're going to do that for me." It's like once you get a great team, and especially if they understand your brand, really intimately, it's amazing what can happen.

Pat: Yeah, I mean I feel very fortunate to, fall under the same category as somebody who has a great team, who definitely understands the values, and



kind of why I do what I do, so that's great. Thank you for that. Then, when it comes to your community Dana, like how do you, besides all the automation stuff we talked about, like how do you get them fired up, how do you build that relationship with them in different ways? I mean sounds like you have an amazing, group of people in your tribe, and how have you been able to build that?

Dana: Sure. Well a couple of things. One, I would say, I took a page from you, and you just offer as much value as you can. The more value you can provide, I think the more people will then jump on your band wagon and, want to just follow you anywhere, because you're giving. I think that's the first thing.

Pat: What is value, how are you providing that value?

Dana: Yeah. We have a Boss Mom's Facebook group, and we're in their daily. We have daily prompts that we go in, that I write the content for. Every day we have so like, one of my favorites is, we have, Throw The Guilt Away Tuesdays. We say, what's one thing in your life that you're doing, that ... For instance, one time I wrote, "You know what, my son has worn the same pair of socks for four days straight."

Because like, I don't have time to do laundry, and I'm going to just throw the guilt away because he'll live you know, it's you know he'll manage. He's eating food, so that's okay that we're give him socks the same every day. It's, Throw The Guilt Away Tuesdays, and we all share things that we just want to throw our guilt away for.

Pat: That's cool.

Dana: You know yeah, and so we have days like that. We have like the, Share Saturdays, where we all post pictures of our kids, and fun things that we are doing with our family. To feel really good about the things that we're doing. We have the, Wins Wednesday, where we even, go in there and sometimes I'll be like, "You know what my win is? I did the dishes today, I emptied up the dishwasher, I loaded the dishwasher, all at the same time, it was amazing, and glorious."

We relate to women, that's it's not just about business, it's not just about family, there's this nice in between. I'm on Periscope a lot, so I do a lot of like, hey here's my morning routine, and hey here's the things that I do to run my business, and here's what my office looks like.

Hey I just did a rants, a late night rant on my boss mom podcast, that I've been getting amazing feedback for, that was basically me talking about, my





kid's been sick for like the last two weeks. It's been crazy hard, to get things done. I'm right in the middle of launching the Boss Mom Academy, which is like a six month coaching program, so it has like an official deadline. I'm in the midst of all this, and it's like 11:30 at night, and I just like decided to do this complete rant to the community. I've gotten such amazing feedback.

It's like thank you for telling me that. I think being authentic, I think you found this too, being authentic, and not being perfect. Being a regular human being, that says, "You can have successful business, and have struggles." I joke, you know I pro-actively cry, I watch The Notebook sometimes, when I need to let it all out.

Pat: Right? Sad.

Dana: Yeah I know. That relates to people, when they feel like they can relate to you, then they communicate with you. When they communicate with you, then you can offer more value by helping solve those problems that they're communicating.

Pat: That's really cool. I like the idea with the Facebook group, and having everybody just share stuff. I do the same thing where I have prompts that go up every day, but some of ... I mean they're all business related now that I think about it. Adding that sort of personal element, could add a new flavor in there, that could really bring people together, and share fun stuff.

People want to feel good and I think when people, have an outlet like that, that you give them, you're giving them permission to share things like that, they feel that they want to come back for more. For some people I know, because this is what it is for me, some people feel like, it's the only place they could share that, which is huge.

Dana: Yeah absolutely. We do like Collaboration Thursdays and things like that too, so we actually promote collaboration with people, and each other. We want our boss moms to work together. Because ultimately like all my clients, are at least parents, I've actually had dad clients, but they're at least parents. Because if they don't get, the fact that my kids get sick and sometimes that is the absolute priority for me, then I can't, it's not going to be a valuable relationship between us.

When you get the right empathy, that understands your current situation, that's why I love all the boss moms working together. Because we really get each other, and we understand each other, and we can work within those realms, of not being like, "Oh, aren't you going to just pound that out for eight hours today, and like get that thing done?"



You're like, "I have an infant, that stays home with me, and I only get to work when she naps, so no." Then they feel guilty about it, it's not that way. I think if you can build a community, where people don't have to feel guilty about who they are, and what they want to accomplish in life, that's when you've got something.

Pat: Yeah for sure. I mean I'm thinking about, where you were, when you were sitting in the hot seat at 1-Day Business Breakthrough. You've come so far, in terms of just, a confidence when talking about your brand, everything is so clear now, I feel.

What did you pick out from that event, or kind of what, not specifically the event, but what has happened since then? How are you able to really own in, on why are you doing what you're doing, who is it for, like what clicked for you, when did that happen?

Dana: Sure. Well once I decided to write the Boss Mom book, right? When I was sitting in your guys's hot seat, my business was currently called, Expand Your Reach right? It was all about helping you grow your business and your family. You guys told me, it was so funny because you're so much softer and in your talk ...

Pat: Oh, Chris is going to love to hear this.

Dana: You know Chris is, and Chris was like, "That's stupid, that's a horrible idea."

Pat: He's like, "Look darling, don't do that."

Dana: He's like, "No." you guys looked at my website and you're like, "No, no all of it no." You're like, "You need to have a brand, that really speaks to this demographic." I went back and like just in the vein of what we've been talking about, I knew. Like I literally have a journalism degree, like I brainstorm with my clients, like it's a forte for me, but when you're in it, like when you're deep in it, you need other people to help you.

Pat: Yeah.

Dana: Come to a different perspective so.

Pat: Amen.

Dana: Yeah, so I called a copy writer that I know and I said, "I need you to help me brainstorm this idea." We came up with a ton of different titles. Then I went



out to the community and I was like, "Okay here's three titles, tell me which one you like." Boss Mom was just unanimously, everybody was just like Boss Mom.

We went, and then I went and got a... Hal had said that he, made the cover of his book long before he ever wrote it so, I was like, "Okay we're going to design the cover." We designed the cover on 99Designs, actually used your promo codes so.

Pat: Oh thank you.

Dana: Then got, you know some three different iterations of that, and then got the women to vote. The very first thing that ultimately, and I promote this all the time, to build this brand, was every single decision I had to make, I asked my community to make it for me.

I asked them to help me name it, I asked them to help me make the tag line, I asked them to help me decide on the cover, I asked them about things they liked about the website, about the table of contents for the book. I continually go out and ask them to help me, make decisions about the brand, and that gets so much excitement.

I had already build up an email list of people that were just excited about, I told them you know, "Great, you'll love what this is going to happen, get the book for free as soon as it comes out." I had already built a list, off of people that wanted to read it, because I had gotten them excited about, the longest journey with me.

Pat: Good. I love that Dana, thank you for sharing that. My other question relates to that, is how do you bring this up? Like so a lot of people out there I know they have an audience already. They might need to make a brand change, or a shift in how they approach their business, how do you go about sharing that with your existing community.

Was it like, "Hey guys I have something important to share with you, I haven't been really feeling it lately, so I'm going to make ..." Like how do you approach that, or how did you do that?

Dana: Well so, I've taken this idea that you can build a business much better by creating a movement, than by offering a service. I think you've done that very well. Basically, what that means is, when I start talking about my brand, and talking about what it's all about, I'm coming from a place that's not me, but it's us.



Instead of going out to the brand and saying, you know to the current community and saying, "You know I'm just not feeling what I'm doing." I go to my community and I said, "Hey, I've discovered something amazing, I found that there are women out there, that yearn to not feel guilty about loving their business, and loving their family. Can honestly believe that they can have a thriving environment in both places, that are really successful and really fulfilled. I'm super excited; I'm so excited in fact that I'm going to go do a little pivot, because when you see a spark, you fan the flame. We're going to move in this new direction, because I think I can help more people by doing it this way, and I hope you come along with me."

I take the movement approach, like don't talk about it like you, talk about it, why it's a bigger and more important thing in the world. How you're going to foster that really big important thing, because you know it can change lives.

Pat: That's so good, that's so good Dana. I think that's a perfect way to end the show here. I think you know people can sit here, and listen to you talk for hours because you have such great things to share. You know I want people to go to [boss-mom.com/spi](http://boss-mom.com/spi), you can download her, Learn How I Run My Business and Team Through Trello.

I use Trello for development, for software, and other things and big projects, but for day to day things, I think, you know I could see how it would work very well for that. That's there [boss-mom.com/spi](http://boss-mom.com/spi). Dana, where can people find out more information about you? What's your twitter handle? Like let's get connected.

Dana: Yeah sure. Our site is [boss-mom.com](http://boss-mom.com), and we feature and celebrate a lot of women there, and have a lot of great posts. We have the boss mom podcast, which you can just search for boss mom, or [boss-mom.com](http://boss-mom.com) iTunes. We are on Instagram, Twitter, basically everywhere, I'm just Dana Malstaff, so it's pretty easy. My big place where I'm normally hanging out is, Periscope. You can find me at Dana Malstaff there, or boss mom, you can find me through both.

Pat: Awesome, thank you so much for coming on. Dana we appreciate you.

Dana: Thanks for having me.

Pat: All right, hope you enjoyed that episode with Dana Malstaff. You can again find her at [boss-mom.com/spi](http://boss-mom.com/spi) to get her free Trello training. Trello is again the tool that I use, in my team for software development, and all this other stuff. It is definitely underutilized, because and I'm definitely going to check out this training also.



Because I know a lot of people like Dana, who have used Trello for their day to day basis, there to dos, and it's a very smart system, I love the way she described it. If you want to check it out, again that's, [boss-mom.com/spi](http://boss-mom.com/spi). Of course the show notes, the links, and the resources, are all mentioned or that were mentioned are all available [@smartpassiveincome.com/session210](http://@smartpassiveincome.com/session210) again that's [smartpassiveincome.com/session210](http://smartpassiveincome.com/session210).

Dana I know you listen to these episodes, thank you so much for coming on, and sharing your wisdom and providing this free training for us. This is going to be great, and I know a lot of people are really going to resonate with this episode. I'd also like to give a shout out to another sponsor which is [CoSchedule.com](http://CoSchedule.com).

[CoSchedule](http://CoSchedule) is one of the most vital tools that we use in team Flynn, to keep our editorial; calendar organized. I ask Garrett to come on, really quick just to tell us how CoSchedule got started, so here he is.

Garrett: Well yeah, CoSchedule was actually born out of, an itch that me and my business partner had. We were doing marketing for our consulting company, and we were finding it constantly frustrating to put together, content marketing, blogging plus social media. I mean we were bouncing around between tools, we had all these spreadsheets and different things going on, and we just really felt like there had to be an easier way to do it.

We started building this tool, that combined the content marketing, blogging and social media work flow together, in exactly the way we wanted it. Turns out, we weren't the only ones having that problem, we had a lot of interest very early on, which you know obviously led us to build the tool.

Pat: Awesome. If you want to check out CoSchedule, there's an extended 30 day free trial offer just for spi listeners. Head on over to, [coschedule.com/spi](http://coschedule.com/spi), again that's [coschedule.com/spi](http://coschedule.com/spi). All right next up, I'd like to also thank [99designs.com](http://99designs.com), an amazing service that you could use to get some design work done for your business. Especially if you're just starting out, and your boot strapping, and you really want to make sure that you get these designs right for you.

[99designs.com](http://99designs.com) is great, because you put in your description of what you'd like, what kind of design, but also what style and all that good stuff. Then different designers from around the world, will compete for your favorite design, which is really cool. Then you can pick your favorite one, you can take that home with you. What's nice is, you get all these different kinds of designers designing, your thing and you get to pick the one that you like.



You could also have your friends and family vote on their favorites too, even your audience, if you want to get them involved, which is really awesome. Anything from a logo, to a t-shirt design, to a complete website, or just a specific learning page, whatever you can think of, you can get designed.

If you want to go ahead and check it out, go to [99designs.com/spi](http://99designs.com/spi), again that's [99designs.com/spi](http://99designs.com/spi). You'll get, \$99 that you can put towards your next design project which will get you access to more designers, and more goodies and stuff. Again that's [99designs.com/spi](http://99designs.com/spi).

Thank you so much, I appreciate you. I look forward to serving you in next week's episode of the Smart Passive Income Podcast. Until then, keep rocking and keep moving forward, keep pushing the needle and I will see you on the next episode. Thanks so much, Bye.

Announcer: Thanks for listening to the Smart Passive Income Podcast, at [www.smartpassiveincome.com](http://www.smartpassiveincome.com).

### **Links to Resources Mentioned in This Episode:**

[Boss-Mom.com](http://Boss-Mom.com)

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