

## **Episode 136: Creating Success out of Chaos with Specific Summit Systems.**

Publish Date: April , 2020

Speaker: Theresa Baretta

Dr. Mark T. Wade: Hey summit hosts, Dr. Mark T. Wade here, founder of Virtual Summits Software and your host on the Virtual Summit podcast. We are in for a treat today something different, something unique, something special that we have never had on the Virtual Summit Podcast previously. We're going to be looking at a specific perspective, a backside, a systematic and effective approach to setting up for you summit speakers out there, but also you, your summit hosts, how you can systematize and improve some of your processes. And the only reason that is possible for us to talk about today is because we have the legendary Theresa Baretta with us today. Theresa, thank you for being here.

Theresa Baretta: Yes, thank you so much for having me here today.

Dr. Mark: A lot of fun. I am so excited about this. Um, I'm excited to get into the, the aspect of, you know, the operations, the systematic processes that you've created, kind of the genius that you've set up in some of these summits, um, for the speakers, um, which we've never talked about before. So I'm excited to jump into that. But before we do even, uh, you know, the post-mortem aspect as we were talking about in our pre-interview chat, I'll just leave that hanging so the listeners are like, what are you talking about? Before we reveal any of that information. Theresa, I would love for you to give the audience just a little bit more information about yourself.

Theresa: Yes, yes. So I am an operations consultant. Um, so I, um, my approach is a hybrid approach where I provide business coaching, um, alongside business consulting to a service based creative, uh, agency owners. Um, and one of the aspects on how I serve them is by, um, uh, integrating right into their business with my team. Um, and what we do is we streamline a lot of their processes and build a lot of their systems and operations so that it can run a systematically and, uh, sufficiently without the agency owner. So, um, allowing the agency owner to easily step in and out to wherever they choose so that they can focus on their zone of genius. Um, and so yes.

Dr. Mark: Um, Whoa, that sounds freaking awesome. Might I say, I mean, I'm sure everybody was just like, um, okay, first off, how'd I get Theresa in my life over here? Because we would all love for things to run systematically without us having to be involved in them on a day to day. So we'll talk about that from the aspect of summits and from speakers who are speaking on summits. But let's dive in. Well, let's first kind of paint the picture. How did we even come about to know each other? What's that common link, that common commonality and that brought you into this Virtual Summit Podcast?

Theresa: Yes, I believe that we have a common friend and colleague and her name is Meg Casebolt. She just rebranded. And so her business is now called Love at First Search, um, formerly known as Megabolt Digital. So she mentioned, and I think she also introduced us that we would actually have, um, a really good partnership to serve your audience.

Dr. Mark: And that is absolutely correct. Meg was actually featured on the podcast, episode 101. I was just looking that up right there. So episode 101, you can go hear that interview. And what we're going to be looking at now is Theresa, we we're going to be jumping into the systems and processes that you've helped create for Meg as she speaks on summit. It's like she's speaking on lots of summits and most of us know from setting up summits as well as being summit speakers. It's not a simple or easy process and it takes a decent amount of time and energy to do for most of us. Well that's where you step in and make this a simplified process. So let's actually, before we even jump into the specific summit speaker process, what do you do? Like let's say I walk into your world and I say, Hey, you know Theresa, I speak on summits regularly or I'm a summit host and now I've got all these things that have to happen. What do you do? How do you, how do you tame my chaos over there?

Theresa: That is such an amazing way to put it because that is essentially what I do. I take you from constantly firefighting. And if you're a quick start, which means like, you know, you love all of the new ideas and new opportunities that comes your way. I help you put it into what we consider a project plan so that we can actually run with it. Um, allow you to effectively hand that off to us and the team would be able to execute that for you and on your behalf.

Theresa: Now, if you were a, um, if you are a virtual summit speaker or even a host, what we would do is in order to, to tame that chaos, um, would be to help you, um, review and uh, and also give or take the word, the appropriate word, but analyze, um, the effects and the ROI of those types of opportunities. So if you had, for example, five, uh, summits that is going to be taking place in the next six weeks and time is of the essence, but also we have limited time. Um, and if you had to pick and choose the, uh, summits that you would be either hosting or partaking in, that's where we would be able to come together and collectively put it on a quote unquote summit calculator, um, to be able to identify what kind of opportunities would be right.

Theresa: Um, we would actually analyze, you know, is it the right season? Um, does it fit well with some of the products that you are offering? Um, does it fit well with your audience? Because let's say if your audience is, for example, um, moms, we know that summer the kids are off, moms are likely going to be not present in the summer. And so some it's in the summer may not work very well. Right? And so we would kind of collectively, um, take a look at that, analyze which opportunities would be, um, great and team the FOMO. So the fear of missing out. That's also something that has always been active as a, as a, uh, entrepreneur. And so I help kind of just dial that down for you so that you don't have any of those, um, feelings of regret or FOMO after those summits or opportunities have passed.

Dr. Mark: I love that. And I think we're just coming up with all kinds of like one line or catch phrases on this episode. This is gonna be so much fun on social afterwards. So tame and my chaos. So you said summit calculator, is that like, is that a real thing? Like can we talk through that process, like, like take us maybe through one of Meg's examples or, or any hypothetical example and how would we analyze what's a good opportunity and how to even know that?

Theresa: Yes, so some of the ways, um, I like to building out a lot of formulas and calculators, so to speak. And so, um, we can, we actually label this as a collaboration calculator in our backend system. Um, but what it does is it provides a scoring metric. So we take into consideration how much time is it going to take us in order to launch or to participate in this virtual summit? Um, if it requires traveling for example, or if it requires, um, you know, lots of preparation, a presentation, um, or a specifically very niched, uh, topic that we would have to talk about. It takes considerable amount of time to, for a, for example, um, another, uh, scoring metrics that comes into play with that formula would be the impact. How much impact would we would, uh, would we be able to have if we partake?

Theresa: Uh, we participated in the summit. Um, are we hitting the right ideal market? So for example, if the summit is for budding entrepreneurs, absolutely we would want to be in that mix. Um, if this summit is for more seasoned entrepreneurs, we would totally be able to have different type of impact at that point in time as well. And so it's just evaluating that type of impact may not necessarily be financial impact, but community impact as well. Um, and some of the other components would be, uh, effort. How much effort do we have to put in there? Um, as well, effort on Meg's part effort on my team's part, um, her team's part, um, and so forth. And that essentially, um, generates a specific number to identify whether or not this collaboration or the summit would be, um, a really great opportunity for us to partake, partake in. And the higher the number, the better the opportunity is. The lower the number is not as high of a priority at that point in time. And we could possibly expend that energy on a different opportunity or uh, or put our focus to somewhere else.

Dr. Mark: Wow. This is like, this is so powerful. I mean like can we do a maybe a not a dumbed down or watered down version of this, maybe like a three points that summit speaker, even a summit host right now that they could just take this as a generic form, you know, until they get over there to you to get the full on accurate analysis. Like, what's maybe like they could take, you know, reach or size of audience or like what are maybe three, two, three, four points that they could look at and be able to apply this to their own audience or situation.

Theresa: Yes, absolutely. So you've hit a few points already. Um, one of them being, for example, the size of the audience that the summit is going to have. Um, how many speakers is already available in the summit, how many speakers within that specific niche, um, that is going to be present in the summit. So for example, um, I have another client, um, where she really specializes in Pinterest for example. And so when we're looking at summits or opportunities for her to speak in, um, we'd take a look at how many other speakers are available or are within that summit, um, speaking on that topic as well. Um, so if there are, uh, complimenting, uh, speakers, we would definitely, that would be a plus to that score. Um, if they are also, um, the other point as well is what type of, uh, of of summit will this be for?

Theresa: And how many, um, excuse me, how many anticipated attendees is going to be, uh, coming to the summit that will also, um, contribute to the scoring of that. And, uh, what are some of the, um, financial considerations of the event? So for example, um, is this event a free summit or is it a paid summit that also brings, um, that component into the

scoring of the collaboration or the, uh, opportunity and also as well, one of the other considerations is, um, affiliate compensation option. So which means do we need to promote the summit? How much do we need to promote the summit for? Um, and whether or not it actually falls in alignment with our content and promotion calendar.

Dr. Mark: Wow. This is just great. I'm loving this. Let's keep diving into this process over here. So we've, you've got this quote unquote summit calculator, which I love that. Um, now let's talk about the process that some of the aspects that you've set up. Let's, let's take Meg for example. So this is like a hands off kind of operation for her. So what are like maybe two or three of the things that you could advise or even, you know, throw over to our summit hosts or summit speakers that they could kind of systemize so that they're not going through the same processes every time when setting up. We're going to speak on a summit.

Theresa: Yes, absolutely. The most simple, um, recommendation I can do is build out your templates and build out two or three variety of those templates. Um, if you are, uh, hoping to be a speaker at a virtual summit, um, one of the best things you can do is create yourself a media kit. Um, so always making sure that you have, um, a document with headshots, um, with a short bio, um, that is consistent across the different summits that you're going to be a part of.

Theresa: Um, and also as well some, um, some key highlights. Um, key highlights from, uh, you know, some of your accomplishments or what you're known for. Um, what has been some of the accolades that you've collected in the past few months or that you helped your, uh, your audience or your clients achieve. And also as well on top of that, the other backside to that is to build out your own internal workflow because when you are a party just painting in your, uh, in a summit or hosting your own, there's going to be a front side workflow that needs to happen, um, on when you're engaging with your potential speakers, um, or hosts. And then the back end work workflow, which is then to allow your team to effectively run with it. So for example, in Meg's business, what we do is we've templated out specific, um, JV partnerships or summits that she would be, um, running with.

Theresa: What we did in order to come to that point is actually analyze a few of her past summits itself, pulling up some of the paperwork, quote unquote paperwork that she had to fill out, um, what she submitted. And then what we did was we templated that. We then created, um, some documents, um, where we would, um, bring it through a specific format. So for example, who is it, um, who, what is the summit's name? Um, who is the summit host? Uh, what is the topic that we're going to be speaking on the audience, um, for that summit? When is that summit going to be happening? Um, and then what are the three points that Meg wants to talk about? What is going to be her underlying product or a lead magnet that she's going to be offering? And then we also template in there, um, uh, all in one document is that who would be responsible for what? So we've put together, that's where we put together the project timeline on when we need to get that specific information to the summit host or summit speakers. Um, and also as well, uh, some of the due dates that we need to make sure make, has all the information she needs to show up.

Dr. Mark: Wow. Um, I'm, my mind's blown just hearing that like, I'm definitely, I'm the chaos monster over here. We're, we're like the yin and the yang right now. Theresa, like you're like, you're the yin to my yang right now. I'm gonna definitely be following up with you after this. So we have the processes, the internal flows, like what are some of the tools or systems that are some of the tools that you use to craft these systems that you have in place?

Theresa: Yes. Um, so typically I am always of the mindset that consolidation is best. Um, consolidation always keeps our systems simple and to keep the workflow simple as well. We know that in today's technology world there's a lot of room for integration between different platforms, different sequences. Um, but I find that if something breaks somewhere, then all of a sudden you have to launch this investigation to figure out where the, the break happened, um, and how to kind of fix that break. And sometimes if you're under a time crunch, that's not always the best thing. So that's why I always encourage one single platform to develop your processes to workflows in. Um, for us, we leverage Samepage. Um, it is a team collaboration tool. We template everything in there. We actually create our SLPs in there as well. And within Samepage, it also has an internal chat function. So we chat, um, think of it like Google docs, um, or even like a project management tool such as Asana, um, Trello, uh, Clickup meets Slack. So we don't even go outside of that tool. Um, if we are working with a smaller virtual summit host, we can actually share that document, um, or that workflow document with that, uh, that virtual host or speaker as well.

Dr. Mark: Man, this is, this is incredible. So let's, I, I'm gonna do a hypothetical scenario right now. So let's say, and then we're going to get into some of the other aspects of analysts and analysis and, and understanding opportunities when with summits or speaking on summits. But, so let's do a hypothetical scenario. Um, like walk us, like if I'm a summit speaker, let's say, and I have an opportunity, let's say I don't have a team, I don't have, you know, your amazing talents and skillsets, uh, behind me. What's like maybe two or three things or key tips of advice that you could give me to either to, to make my process easier, better, more efficient.

Theresa: That is a really, really great hypothetical situation for sure. So if you are a solopreneur or a one person show where you don't have a team to back you, um, to, to do a lot of this for you. Um, one of the key aspects that can really help support you is um, to, uh, in streamlining a lot of your processes is by one leveraging automation. So finding the right either summit tool, um, to do a lot of the leg work for you, um, or uh, to be able to, um, really refine your workflow. So for example, if you, um, if you are the host, one of the, uh, easy, uh, platforms, um, that you can apply would be a platform that Dr. Mark, uh, offers as well for virtual summits. Um, and you can also use other platforms such as the Dubsado to streamline a lot of your, um, your paperwork that wouldn't be, that you would need in place. So either.

Dr. Mark: Could you say that again what's the name for it?

Theresa: Dubsado. Yes. Um, so it's a workflow management system where it allows you to send a contract, especially if you are risk adverse, um, for your summits, um, to provide that type of documentation. Um, digital signatures becomes, uh, automated through that

process. And you can also set up a welcome sequence to your, uh, summit, uh, host or to your summit speakers as well. Um, so it's just about figuring out what is going to be a, what I'd like to call the domino effect that can really go the farthest route for you as a solopreneur. So those are some of the, the short systems that you can apply if you are a one person show. Um, alternatively, it's about building out your workflow. So pulling up those checklists, going through them systematically. And it does require discipline if you are a one person show.

Dr. Mark: Not discipline, no, not the D word. Ah, okay. No, we can do that. We can do some discipline over here. Let's, let's, let's keep rocking and rolling with that. Okay. So this is a really great insights into one, you know, for all of you, summit hosts, some speakers right there, simplify theme out. Take some time to actually do this and it's gonna you're gonna reap the benefits and the rewards on the backend. So definitely. Now, let's, let's speak in a back end. Let's kinda alter our prospect, alter our position here. Let's say we've gone through a summit. You perform something called the post-mortem, which I love the name of that right there. Let's talk through that. Well, first off, what is that in relationship to the summit, you know, summit speaker and then let's jump into that process.

Theresa: Yes. So, and I'm, I'm, I've, I love data and that is something that really excites me, especially if you've just wrapped up a project, right? You're coming down from a high, from the high energy from that. But it's about really, um, going with the facts. And when we approach it by, when we do a post-mortem on it, we actually go through the calculator itself. So we start analyzing, um, you know, like, Hey, uh, it's not just only about the ROI from it. So to speak, right? We also want to analyze it from the team's perspective. Was it a very streamlined process? Um, did we hit all the, the uh, dots on point. Um, did we deliver as promised? Um, how many, how much did we grow our list by, for example, how many sales are we able to correlate back to that type of opportunity?

Theresa: And, um, how is Meg's energy feeling from it? That is the biggest key because if she feels so totally powered up in her zone of element that is totally a summit that we would want to rinse and repeat or find a similar, uh, summits to be a part of. Now, if that was a draining experience, we would totally take into consideration a mess. If the ROI is really high, we may not participate, uh, participate in a similar summit again, right? So it's goes deeper than just the numbers as well. It goes into the, um, and it goes just the financial aspect, but it goes into how the team feels on it, how well we executed, what did we learn from the execution and what can we bring into our process better for the next round as well.

Dr. Mark: Wow. There's a lot of little pieces that you just said there. So we're going to dive into this. First off, how do we analyze this? Like how do you actually analyze this, cause you named the team, you named the numbers you named make how Meg feels like what, how are there different times? Is there a team flow, like kind of walk us through the process of how you would get that information from each of those and then like maybe how much time it would take to actually do.

Theresa: Yes. So we typically like to make sure that it is short, simple and sweet. Um, so after the summit has taken place or the JV opportunity has taken place, we give it about, um, 10 days afterwards. Um, what we do is we trigger a workflow or we set up a task to remind us that we need to go in. So a specific team member would go into, um, the tools, um, whether it is ConvertKit, which is our email marketing tool or the webinar tool, um, to be able to pull some of the numbers that we're able to, to secure. Um, typically we would get that information from the summit hosts, uh, as well. Um, if we were a summit speaker and then we try and gather all of that data, get some of the sales that have summit as well to see if we can correlate the two.

Theresa: Um, so that process in itself takes about 30 minutes. Um, if it goes beyond the 30 minutes, then that's when we need to, um, evaluate, okay, how can we streamline this? Can we have other reporting tools that can, can bring that in much quicker? Um, and or else do we have to prepare some of those links ahead of time so that we can just go easily, uh, into, um, those tools at the moment when we are doing the post-mortem. And then what we would do is record it at the bottom of our, uh, our, uh, summit, um, or workflow document. So in that way it keeps it all consolidated into one document so we don't have to lose track of it. Um, so we pulled the numbers first. Um, then I connect with the team to get their feedback, what worked, what didn't work, what can we do differently, what did they enjoy? And then I would meet with Meg at a separate time. Um, we would go through about 20 minutes. Um, just reviewing and recapping how the, uh, the venture, uh, took place. So on Meg's part, it takes about 20 minutes for, for myself and the team, it takes about 40 minutes. So all in all, it shouldn't be a lengthy process.

Dr. Mark: I was not expecting that. I was expecting hours or weeks, days, you know. Wow. I think that's a, that's totally doable right there. I mean, not doable on my own, but like I could, I could sit in for that. That's pretty awesome right there. Now, um, I do wanna kind of dig into understanding, well, you've talked about you've got these numbers, you in your, you've got an analytic beautiful analytic brain and you, you're, you're looking at like what numbers do, what, what are some of the things maybe you've seen over your, your, the period of time you've been working that, uh, you know, with mag or even other clients, some of the things that have made the biggest changes or biggest differences to increase the overall numbers, whether it's template or what she says or how you offer it. Like just any kind of stats that have jumped out that have made an impact or difference.

Theresa: Really great question. Um, I don't think I can pinpoint a specific, um, aspect to it because as, um, as this world evolves, um, how a virtual summit was run a year ago, two years ago varies and differs to what, um, what the current could be, um, or is, is, um, is at right now. But what I have found over time is that if your process is strong, um, and it doesn't deviate, um, like, you know, you're doing workarounds or you're doing one offs, um, it definitely cuts down your time over and over again as you perform. Excuse me, as you perform those summits, um, or run those summits now, if you are entertaining a lot of customization, one-offs doing backdoor, um, handshaking so to speak, or giving them something extra special, um, so to speak. So for example, a behind the scenes glimpse or a trade in some things, those are some of the legs, um, or delays, I would say, um,

that really impacts the performance of the team and how well we can execute at the end of the day.

Dr. Mark: Well, I just got to say, you've got my brain going. I've got all kinds of ideas and thoughts that I want to do and in multiple different areas. So, and it's got me realizing how much in my summit business and other businesses that are not streamlined and templated and process processed out and how much that could be saving me if I would do that. So as we wrap this up here, Theresa, one, this has been phenomenal. Um, but I would love for you to kind of, well first off, let's get with where are you at? Where are you hanging out at? How can people get ahold of you? Cause I know everybody's like Mark, don't forget to say that cause we all want to go find out, find Theresa and get a piece of her and, and see where she's at and talk to her and throw our ideas at her. So let everybody know where you're hanging out and the best way to get in touch with you.

Theresa: Absolutely. So you can find me on YouTube. Um, I find that that's one area where, uh, just builds that strong connection. Um, and I like to always share my screen. So I like to walk my audience through the backend of my own systems and how we build out templates, workflows and processes ourselves as well. So you can find me on YouTube. Just search Theresa Beretta and you will find me there. Alternatively, you can also find me on my website, [www.looplinc.com](http://www.looplinc.com).

Dr. Mark: Love it. And we're going to link to all of that in the show notes too, so that lives on forever and everybody can find you. Now before we hop off here, I would love for you to kind of, you know, give the summit hosts and the summit speakers listening right now, like kind of a final parting piece of wisdom.

Theresa: Yes. The best thing that I can encourage you to do is even if you are a team of one or a team of two or a team of 10, um, it all starts from documenting your processes. And the one underlying key when it does come to process is think of it more as a, um, amazing guideline because processes will never be perfect. We're always continuously improving it. But if you have the mindset of it working 80% of the time and leaving the 20% as room for innovation, you're going to find yourself being able to help your team stay empowered, um, to run with the processes or allow yourself to evolve from those processes.

Dr. Mark: Oh, good. Oh, Theresa, thank you so much for being here with us today. This has been absolutely phenomenal.

Theresa: Yes, thank you so much for having me on your show here. I love it and hopefully I will be able to see more of you and, um, that this has served your audience.

Dr. Mark: It absolutely has. So thank you again and thank you all of you summit hosts for tuning in to today's episode with Theresa and I. I'm Dr. Mark T. Wade, your host here on the virtual summit podcast. And just remember your message matters. So go out there and make an impact in the world. Don't forget to check out all of these amazing little summit gyms and goodies that has given us over in the show notes at [podcast.virtualsummits.com](http://podcast.virtualsummits.com).138. We'll see you on the next episode.



Dr. Mark: Now I want to end this episode by saying to all the summit hosts listening right now, I believe in you and you can do this. Summits are by far one of the most powerful ways to quickly grow your list, launch your platform, make more money, and most importantly, make an impact in the world even if you're just getting started. So don't get caught up in analysis paralysis because the world needs to hear your message. There are people who are waiting for you to help them just get started because imperfect action is always better than no action. Thank you and see you on the next episode.