



New Agent Bootcamp: Business 101

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The beginning of a new business starts with a vision and a plan.

What should your plan include:

1. Business Overview

- Knowing who you are and where you are going - big picture
- Clear vision - know your lens and benefits you provide to your clients

2. Target Market

- Describe your ideal client
- Know their demographic, what is important to them, what brands do they like, where do they hang out etc..

3. Marketing Plan

- Build a brand that resonates to your ideal client
- What, where, when list building and relationship strategies

4. Operational Plan

- Setting standard for client experience (your special sauce)
- Travel design system to wow your clients

5. Financial Plan

- Set revenue goals
- Know your numbers



New Agent Bootcamp: Productivity 101

Robin Bradley |
Co-Founder and CEO of Tique



Prioritizing Your Task List For Max. Productivity

Everyone has probably already talked extensively about time batching, but taking the time to figure out a way to organize your daily priorities is so important.

As a CEO you are typically a team of one while you are starting out & juggling all the balls at one time:

- Finding new clients
- Creating a stellar client experience for your clients
- Connecting with suppliers to form lasting relationships
- Publishing social marketing content
- The list goes on...

It is quick to get overwhelmed which is why I have a system for organizing your never-ending task list.

Disclaimer: This is what works for me so you can try it out, take pieces of what I do and create your own system, whatever works for you!

The worst “system” you can make is a system in which you never use.

How I Prioritize

- List all “departments” of your business
 - If you are thinking, I am a team of one I do not have departments, then think of your big business goals 5-10 years down the line when you are absolutely killing it in the travel business - what departments are in place then?
 - How I organize my business: Admin, Operations, Marketing, Sales, Vision/Growth • Put those departments as headers inside of a Google Doc or ClickUp.
- Brain dump absolutely everything you do on a daily basis - from answering emails to creating social media captions to researching dinner spots for itineraries...everything. Then take that big dump of tasks and organize it into one of the five categories it best falls under.
- Once that is complete, you are going to list next to the task whether it’s daily, weekly, monthly, or quarterly
 - Examples:
 - Organizing inbox - daily
 - Brainstorming social media content - monthly
 - Client sales calls - weekly (Tuesday - Thursday)

This list might seem overwhelming - but we are going to use this list to map out your daily tasks to keep you on track each week using a system that gives you clear direction for each day, week, and month. It’s the most freeing thing in the world to know what you have each day!



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Organizing Your Calendar

Using whatever calendar system you have - I use Google Calendar - create a “calendar” type for each of your departments. I also have one just titled “Robin” for my personal appointments, reminders, etc.

Now using the list I just created, I go in and schedule out my tasks:

- Monthly
- Weekly
- Daily

Each week I will evaluate what is on my calendar and assign it as either a rock, pebble, or sand.

- **Rock:** Goes into my calendar first - these are the immovable tasks like scheduled client calls, supplier meetings, etc.
- **Pebble:** These are important tasks that should be prioritized and finished during the week but I have more flexibility to move them around - things like scheduling all social content for the week, auditing all upcoming trips in TravelJoy, etc.
- **Sand:** These are filler tasks that can go just about anywhere - answering emails, requesting quotes from suppliers, etc.

The rocks all go on the calendar first.

From there, I look at my weekly tasks and put the pebbles on the calendar. My sand is all listed in a daily event at the top of my calendar labeled “To Do”. They are things I either need to do, should do, or want to do.

Another way to time block is to either categorize by your days, weeks, or a combination of both.

- **Days:** Assigning different blocks for different times of day throughout the day.
- **Weeks:** Time block each days of the week with different types of tasks.
- **Combo:** Using some days for specific blocks and leaving some days for timeblocking - where you do multiple types of tasks in those days.

Please know that this takes trial and error to see what works for you. Practice to ensure that you stick to your schedule as it is hard to wander off task when you work for yourself... but practicing discipline increases your personal discipline.



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CEO Days

What they are and why you should schedule them into your work weeks

What is a CEO Day?

- A day out of the month, week, quarter, etc. that you dedicate to working on your business, not just in your business. Oftentimes we get so caught up in client work that we forget to take the time to step away from clients and focus on our business.
- Tasks on this day could be:
 - Taking a course
 - Tracking your finances
 - Evaluating your sales & close rate
 - Sourcing stock imagery & brain dumps content ideas
 - Revamping your welcome sequence in Flodesk/whatever email marketing platform you use
 - Taking some time for self care

How Often to Schedule a CEO Day?

- This depends on your time-blocking schedule. A good rule of thumb is to at least pencil one CEO day on your schedule per month.

CEO Day Rules:

- No client work. At all.
- Honor your time to your business & stay on track by keeping a list of your CEO day tasks. When you get a really awesome idea for something, keep a note of possible CEO day tasks that you can come back to when you start planning your CEO day.
- [Here is a helpful blog post article](#) where I dive more into CEO days, how I structure mine, etc.