

Meeting Summary for Purpose Accelerator - Tanya

[Video Link:](#)

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Quick recap

JJ and Tanya discussed strategies for Tanya's business growth, including prioritizing personal goals, setting boundaries, and utilizing various tools like Google Workspace, Google Calendar, and Zoom. They also explored the creation and maintenance of websites, the use of platforms like Stan and Stripe for selling digital products, and the progress of Tanya's box creation project. JJ offered to build and host websites for clients at a lower cost and demonstrated how to create a digital product using Canva.

Next steps

- Set up and learn how to use Stripe for payment processing
- Research and decide on packaging options based on availability and cost
- Design and finalize all 5 items to be included in the box, ensuring consistent branding and color scheme
- Create a detailed drawing of the box layout, including measurements for each item
- Contact Canva customer support to inquire about printing options for box templates and other materials
- Contact the box supplier to inquire about specific box sizes and options
- Prepare all card designs in Canva for JJ to review in the next session
- Set up a Stan account to sell digital products and manage customers
- Create content for digital workbooks and resources using Canva
- Decide on pricing strategy for digital products and physical boxes
- Download and set up Zoom, connecting it to Google Calendar
- Practice using Google Drive, Google Docs, and Google Calendar
- Explore using Tidycal for appointment scheduling integration
- Implement stricter boundaries around phone calls and availability to others
- Set a consistent sleep schedule and prioritize getting enough rest
- Listen to the book "Let Them" by Mel Robbins
- Send a more assertive follow-up email regarding work schedule approval

- Visualize the successful businesswoman she wants to become and identify steps to close the gap
- Prioritize working on her business during designated times
- Work on changing her mindset regarding technology and learning new skills

Summary

Prioritizing Business and Disciplined Routines

JJ encourages Tanya to prioritize her business by working on it first thing in the morning, before starting her regular workday. He suggests that waking up earlier and dedicating an hour to her business can be more effective than trying to work on it after a long day at her job. JJ shares his own experience with sleep struggles and emphasizes the importance of disciplined routines and prioritizing personal goals over feelings of tiredness. He also mentions doing a time audit to understand how time is spent and make more intentional choices.

Setting Boundaries for Personal Growth

JJ and Tanya discuss the importance of setting boundaries and prioritizing time for personal growth and business development. JJ emphasizes the need to be kind to oneself by establishing clear boundaries with family and friends. Tanya acknowledges the challenge of implementing these boundaries but recognizes their necessity. They explore strategies like using "Do Not Disturb" settings on phones and designating specific times for communication. JJ encourages Tanya to view her business work as equally important as her regular job and to protect that time accordingly.

Strategies for Business Growth and Self-Development

JJ and Tanya discussed strategies for Tanya's business growth and personal development. JJ encouraged Tanya to visualize her ideal business and the person she needs to become to achieve it. They discussed the importance of setting boundaries, prioritizing self-care, and being

more assertive. JJ recommended Tanya to listen to the book "Let Them" by Mel Robbins to help with boundary setting and self-identity. They also discussed Tanya's work situation, with JJ advising her to be more assertive in her communication with her manager. JJ emphasized the importance of understanding one's purpose and identity to effectively manage boundaries and work towards business goals.

Google Workspace Training and Features

JJ and Tanya discussed the functionalities of Google Workspace, specifically Google Drive and Google Docs. JJ explained how to create a new document, share it with others, and manage access levels. He emphasized that Google Docs automatically saves changes, eliminating the need for manual saving. Tanya understood the process and found it easier than using Microsoft Word. They ended the conversation with JJ promising to provide further training on advanced Google Docs features.

Google Calendar and Zoom Integration

JJ and Tanya discussed the integration of Google Calendar with Zoom for scheduling appointments. JJ explained how to create recurring events on Google Calendar and how to make them Zoom meetings. They also discussed the benefits of Zoom, such as automatic meeting summaries and the ability to connect with clients via Zoom. JJ introduced Tidy Cow, a booking system that integrates with Zoom, which is useful for scheduling counseling or coaching sessions. Tanya expressed interest in using these tools for her business.

Website Creation and Digital Products

JJ and Tanya discussed the creation and maintenance of websites, with JJ offering to build and host websites for clients at a lower cost than traditional hosting services. JJ also explained the concept of hosting, likening it to council tax for a physical property. They discussed the possibility

of creating digital products for clients who may not be able to afford physical products. JJ suggested that digital products could be created and sold quickly, while physical products could be developed later. Tanya expressed interest in both options, seeing the value in both digital and physical products. JJ confirmed that there was no reason why both options couldn't be pursued simultaneously.

Creating Digital Products With Canva

JJ demonstrated how to create a digital product using Canva, a graphic design tool. JJ guided Tanya through the process of creating a workbook, including adding images, changing colors, and formatting text. JJ also showed how to upload the workbook to a store, such as Stan, for sale. The discussion highlighted the ease of use and versatility of Canva for creating digital products.

Exploring Stan for Digital Sales

JJ and Tanya discussed the use of a platform called Stan for selling digital products. JJ explained how to create a product page, set prices, and add required fields for customers to input their information. They also discussed the automatic email confirmation sent to customers upon purchase. JJ emphasized the benefits of using Stan, including the ability to track customer purchases and download their information, as well as the platform's training resources. They also compared Stan to other platforms like Linktree, which allows for similar functionality but in a different format.

Stripe's Role in Online Store Transactions

JJ explained the role of Stripe as a payment facilitator, allowing money to be transferred to users when they buy products from websites like Stan. He also discussed various online stores like Etsy, WooCommerce, and Shopify, which serve as shop windows for sellers to showcase their

products. JJ emphasized that the responsibility of delivering products or refunds lies with the seller, not the store. He also introduced Tidy Cow, a system used for booking sessions, which can be integrated with Stripe and other platforms. JJ suggested that for a single product, digital reach might be a quicker option before setting up a physical product store. He also demonstrated how a website can be set up to facilitate bookings and payments.

Box Creation Project Progress

JJ and Tanya discussed the progress of Tanya's box creation project. JJ emphasized the importance of creating all the necessary items for the box, including the cards, and suggested using Canva for printing the cards. Tanya expressed interest in using Canva and also considering other services for the box. JJ advised Tanya to consider all the items that will go into the box and their sizes, and to ensure they all align with the brand. They agreed to schedule two more sessions, with a gap of two weeks between them, to further discuss the project.