You're listening to You've Got This, episode 391.

Welcome to You've Got This, a weekly podcast for higher education professionals looking to increase their confidence and capacity for juggling the day-to-day demands of an academic life.

I'm your host, Dr.

Katie Linder.

On this episode, I want to share some of the debrief from my business retreat that I did at the end of June into early July.

You may remember from my 24 goals for 2024 that I had a goal to have a business retreat.

I thought that my two-week vacation off of work in the summer would be the perfect time to get this done.

You may see that the episode is labeled a "creative retreat" in terms of what I'm debriefing.

I would say that is absolutely true.

This was a very creative time for me, and I loved having the time away to do some design work, which I'm going to talk a little bit about today and also a little bit about on the next episode so that I can do a deeper dive.

First let me share some of the higher-level reflection and thinking that I was hoping to do during this retreat, talk about some of the tasks that I was able to complete, and then also give you a quick update on a couple other things that happened in the month of July while I've been away from the podcast.

So what I was hoping to do in this business retreat was to really remind myself and review a bunch of previous notes of business ideas, direction, and vision that I've had jotting down over a period of years and just kind of recenter myself on what are some of the goals that I have for this business in the coming years.

I also wanted to review the status of some of my previous business goals and refresh my business goals for the next three to five years.

Now I had a couple of stretch goals, which I will just acknowledge I did not get to, and I'm planning to do them a little bit later this year.

And that included things like looking over the finances of my recurring expenses and things like that for the business.

And you're going to find out really soon as I talk about the tasks that I completed, why I did not get to those kinds of tasks during this retreat period.

But I'm super, super happy with the things that I did get to, and I feel like I spent the time well.

So let me talk to you a little bit about what I actually did during this period of time that I set aside for this business retreat.

The main thing that I did was course design.

So I ended up drafting course outlines and structures and most specifically training guides for five new courses.

Now four of these five courses are part of a new suite of trainings that I am planning to offer in 2025 around project management.

Now some of you have been listening for long enough that you might remember a few years back, this was something that was like a dream of mine to start to do project management trainings.

And then with moves and job changes and all kinds of things, I had to kind of set it aside.

I did not have the time to dive in.

And it is finally the time to really dig into project management in the higher education space and really try to start to translate how can we use project management terminology and tools that are often used in industry in our own spaces where it can be kind of hard to translate that kind of thing.

So I have four courses that I designed in this new suite of trainings that I'm calling project management by design.

And one of the courses is for individual people like faculty or staff that just are running their own projects and they want to have a deeper understanding of how to align those projects with things like their values and their goals.

A second training is for people who are collaborating or leading teams with different projects.

So if you are a researcher who's collaborating a lot, or if you are a manager who's like leading a team that does a lot of projects, this is the class for you.

So it covers team project management.

Then there's a project management for leaders.

And by that, I mean more executive leaders, people who are overseeing the project teams, but who are not like really in the projects themselves.

So these are people who are like executive sponsors and how do they do this at a higher level across like an organization or an institution.

And then the fourth course is for coaches.

This is part of my coach training program and it's for coaches who are working with people who are managing projects and what are the kinds of tools and structures that they can offer to their clients to be managing projects well.

I also decided to pull together what I'm calling a study club for anybody who comes through these trainings and does want to pursue the PMP, which is a project management professional certification, which I happen to have, but I know that the exam can be very intimidating and overwhelming for people.

So I also have an offering in 2025, a couple of times throughout the year to basically come and like sit with other people and kind of like practice and train for that exam.

Who knows if anyone is going to want that particular option, but I am hoping that the other suite of trainings is definitely going to be of interest to people because I have talked to so many people who are interested in project management, but find, you know, some of the more industry specific texts and things that are, you know, aimed at more kind of corporate spaces that they don't really fit higher ed in an appropriate way.

I am going to do a much deeper dive on this project management by design suite of trainings next episode.

So if you are kind of like intrigued by this, I will drop a link into the show notes of the website that I created to share a little bit more information on this.

But I will say that this, this was a major task that I was working on during this retreat.

I not only drafted the syllabi, the learning objectives, the content, but I also drafted course training guides, hundreds and hundreds and hundreds of pages of content of what I wanted to be actually teaching people in these courses.

So if you come into these courses, I will just give you a spoiler alert that you get your very own printed training guide that I have drafted.

And there's also going to be some supplemental course texts as well, but I think are going to be really fun.

Now I also drafted in addition to all of that project management, uh, fun stuff.

I drafted another new course for my coach training program on coaching neurodiverse clients.

Now you have probably heard me mention this on a previous episode that I've been doing a deeper dive on this area.

I have a reading list that I will link, um, in the show notes that I've been like trying to work my way through.

And I also was able to draft the syllabus, the learning objectives, and also a course training guide for that, um, coaching neurodiverse clients course.

Now what is kind of fun is that particular course and the one for coaches in the project management sequence, I've already gotten them approved.

I put in my paperwork to the international coaching Federation and they are already approved to be my accredited coach training program.

So I will be adding this to the coach training site soon.

If you are someone who is in my coach training or who is interested in coach training, these are going to be a new, um, set of resources for coaches who are coming through the program, which I'm really, really excited about.

Okay.

So in addition to a lot of that content, which I would say this was the bulk of the retreat was, you know, doing, uh, like the course design.

And I will just give you like a little bit of a glimpse.

I feel like there were times when my partner was like, what is happening with you?

We have these large kind of like picture windows in our living room.

And I took over one of the windows with all of these like color coded post-it notes.

And that was how I mapped out each of these courses, because one of the things that was really important to me was to not have a ton of content overlap across all these courses.

Cause I figured some people might take more than one.

So there's a little bit of fundamental stuff that is kind of overlapping, but there's a lot that is new in each one of these different courses.

And I really wanted to be careful about that.

And so I did all this mapping on this picture window, which was super fun.

I mean, I was really just like loving this entire experience.

I mean, if, again, if you've been listening for a while, you know, I love creating things and this was incredibly fun to do.

I also created course shells for all of these courses in like the course management system that I use.

I drafted the project management by design webpage that is on my website right now.

Again, I will link to that in the show notes.

And so that was a massive part of what I was working on.

Now a couple other things that were just tasks that I was able to check off during this retreat.

One of them that which felt huge was I went ahead and like mapped out my entire 2025 schedule for services and programs and added this all into my Google calendar.

This is something that I actually really like to do like midway through the year of the previous year.

I don't like to wait until the last minute to do this because it really helps me to understand an entire year in advance, what I can add in.

What are things that I need to kind of just be aware of in terms of my own capacity and schedule.

And what I realized was I was also able to add in an annual planning retreat in December for my prolific community.

This is the online community that I facilitate.

And also I'm going to add in quarterly planning retreats to prolific in 2025.

Now a couple other additions to my 2025 calendar include live sessions for project management by design courses.

This is not asynchronous.

This is me facilitating live with groups of people all these different courses around project management because based on this content, you really need to just like talk through it and have like clear examples.

So I'm really excited to add that into my calendar for 2025 as well.

So this was a big part of like, it was like half a day where I was like figuring out all the timing for this, adding everything into my calendar.

So that was something that I spent a pretty significant portion of time on as well.

There were a couple other things.

One is I started to research some like YouTube video how tos.

There's some things that I've been wanting to try out in some of my videos.

And so that was just kind of something I did on the side when I got kind of tired and I needed to like take a little bit of a brain break.

And I also did a bunch of miscellaneous website and it's primarily related to the new blended course design book updates.

There were several different parts of my website that I needed to kind of update.

And there's a book website for that book that needed to be updated.

And then one of the more exciting things that happened over this period and partially because of these website updates is I decided to hire a web designer and developer to update my main website.

This is something that I felt like it's been needed for a while.

It's probably been five or six years since I did the major overhaul of my primary website.

And I've been feeling just a little bit of pressure around that because I know I don't have the time to do it myself and to do like an entire brand refresh and really like look at every page and think about how I want to do it differently.

I have a bit of a vision of what I'm trying to do, but to try to execute that vision feels just like way too much in terms of everything else I have on my plate.

So I found someone, I interviewed that person and I hired them over the course of this creative retreat.

And so I am excited to start working on that and to hopefully have the new site probably before the end of this calendar year.

Of course, when I have that ready, I'll let you all know.

Little other things.

So that was the bulk of the tasks.

So that's the bulk of the tasks that I was able to complete over this creative retreat period.

As you can hear, a number of them were really, really tied to the course design, development, and content creation.

I did look over business goals.

I did think about direction, vision as kind of part of this overall task creation.

And I started to think about, you know, how do I want to augment my business goals for the next three to five years?

So this felt like an incredibly productive, creative space for me.

And I was truly able to kind of step away from my work, my day to day work, so that I could really focus on this.

And it was incredibly satisfying.

I did want to mention a couple other things that happened in July, just to play a little bit of catch up so that if I mention it in future episodes, it will make sense.

One thing is just I took a couple of work trips to Chicago over a couple of weeks of time.

And so that was something that allowed me to have some like good reading time and also connect with some colleagues, which was really great.

There was also a leadership transition announced at my institution in July that is taking place in August.

And this is our chancellor who is stepping down and is going to be replaced by an interim chancellor initially, and then a permanent chancellor, obviously, hopefully sometime in the early part of 2025.

So this is something that clearly impacts, you know, my work there.

I do report directly to our chancellor for part of my portfolio.

And so I'm going to be going through, you know, a lot of transition, which I know many of you have experienced as well.

A lot of institutions have gone through a variety of leadership transitions.

And so this was something that is just kind of like, you know, in my world right now that I'm working through.

And then the other thing that happened in July is I started to do some deeper work with a group of wonderful colleagues on an edited collection that we are putting together on coaching and higher education.

And we had several meetings.

We got a number of people submitting abstracts.

We started to work on the introduction for that.

And this is kind of my next writing project that I'm working on that is tied to coaching and higher ed, which I'm really excited.

I'm so thrilled to be working with this editorial team.

Now I would also be remiss if I didn't mention that I also have spent time recently looking at my 2025 goals list.

Now you might think it's a little bit, you know, early in the year to be doing that, but I honestly just can't help myself.

I feel like when I start to get toward the fall time, I really want to be thinking about, you know, planning ahead for the next year and really trying to get some things in place for certain kinds of goals that I want to really work on in the next calendar year.

And so I've started to draft some of that too.

And it was really helpful to have this kind of calendar plan for 2025.

It got me in kind of the mode of thinking about what are the kinds of things that I really want to prioritize and focus on in the coming year.

So that is a little bit about my summer creative and business retreat that happened in late June and early July.

I loved this time.

It was so refreshing and creative.

And it reminded me of some of my really early quarterly retreats that I did years and years ago where I would just allow myself to kind of turn on that creative faucet and see what came out.

And this was really, really fun and energizing.

So I'm also really happy to be back to content creation on the podcast after taking my restful July break.

It allowed me to kind of pull back, think about some things that I want to be talking about in the remainder of this year, both on the podcast and the blog.

And I'm looking forward to sharing some more content with you in the remainder of this year.

Next week, stay tuned for a much deeper dive on project management by design.

If you are interested, though, you're welcome to check out the website that's going to be linked in the show notes.

And there are opportunities even now to start enrolling for any of those courses.

If that is of interest to you, of course, I'm happy to answer additional questions that you might have as well.

You can always email me at hello@drkatylinder.com.

As you know, I always love to hear from you.

Thanks so much for listening.

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