Checklist

Sprout School

MASTER YOUR PHOTOGRAPHY BUSINESS

PDF GUIDE

Print me!

Welcome to

Sprout School

Sprout Studio users that finish Sprout School in under 10 days are 5x more likely to find success!

So invest in yourself and prioritize the success of your photography business in just 10 days:

I, ______________________________ (your name) commit to finishing Sprout School in ___________ (days) starting on _______________ (today's date).

PS. We found the features that increase business success across our users long-term! These recommended must-do's will be highlighted in your checklists:

The 7 Keys to Success in Sprout School

- Add a Payment Processor (Module 2 Lesson 12)
- Set-up Taxes for Clients (Module 2 Lesson 9)
- Create a Questionnaire (Module 3 Lesson 15)
- Build a Package in your Price Lists (Module 2 Lesson 7)
- Write your First Email (Module 2 Lesson 10)
- Book your First Lead (Module 3 Lesson 2)
- Add a Booking Proposal Template (Module 3 Lesson 4)

You got this! Let's begin ...

Checklist

Sprout School

Getting your Account Set Up

Lesson 1: Getting back into "Startup Wizard"

- [ ] Go through each slide and confirm your details
- [ ] Click save

Lesson 2: Setting up your "Account Metadata"

- [ ] Drag and drop to rearrange your metadata categories
- [ ] Sort A-Z or Z-A
- [ ] Review a "Shoot Type"
- [ ] Toggle "Yes" or "No" to have shoot type on a "Contact Form"
- [ ] Click "Update"
- [ ] Add a new "Shoot Type"
- [ ] Add a "Lead Source"
- [ ] Toggle your "Contact Form" preferences
- [ ] Add a "Reason for Closing"
- [ ] Add a "Lead Status"
- [ ] Add a "Contact Field"
- [ ] Add "Contact Roles"
- [ ] Add "Lead/Shoot Roles"

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Getting your Account Set Up

Lesson 3: Customize your "Preferences"

- ○ Write-off "Allowance/KM" > Type $ amount
- ○ Adjust timezone
- ○ Select your default currency and payment settings
- ○ Set default booking proposal expiration
- ○ Set default gallery expiration
- ○ Toggle "On" or "Off" gallery auto favourite submission
- ○ Adjust tracking settings
- ○ Select BBC (blind carbon copy) settings
- ○ Auto BBC = Toggle "On" or "Off"

Lesson 4: Set up your "Profile"

- ○ Set your personal information (ie. username, password, email)
- ○ Create a profile (biography)
- ○ Edit your user settings (ie. temperature unit, gallery upload mode)
- ○ Set theme preferences
- ○ Select notifications preferences
- ○ Choose the email you'd like to use
- ○ Edit the email "Sender" preferences

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Getting your Account Set Up

Lesson 5: Sync your "Google Calendar"

- [ ] Two-way calendar sync > Click authorize Google calendar account
- [ ] Choose an account > Click "Allow" button
- [ ] Configure your Google calendars > Choose "Show" and/or "Check"
- [ ] Configure syncing > Choose "Don't Sync" or "Calendar"

Tip: Open your Google calendar and add a sample shoot to test the sync!

Lesson 6: Show off your "Brand"

- [ ] Upload a new logo
- [ ] Add customize your "Brand Domain" = your URL
- [ ] Change your subdomain with the dropdown
- [ ] Visible/utilized on all your client-facing pages (ie. client portal)
- [ ] Add address
- [ ] Select your accent colour
- [ ] Upload a cover photo = displayed in your client portal
- [ ] Upload an email header
- [ ] Upload favicon
- [ ] Upload a gallery cover
- [ ] Create your brand portfolio

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Getting your Account Set Up

Lesson 7: Configure your "Price Lists"

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- ○ Create a new "Price List"
- ○ Build your print offerings
- ○ Use the "Pricing Assistant Calculator"
- ○ Customize the "Style & Design"
- ○ Build your "Product" offerings
- ○ Build your "Services" offerings
- ○ Build your "Digital" offerings
- ○ Build your "Package" offerings

Tip: Save time by utilizing Sprout's pre-built "Print" offerings (Self-Fulfilled)

Lesson 8: Customize your "Shop"

- ○ Open a pre-existing "Price List"
- ○ Toggle "Enable Shop" (default state = auto layout)
- ○ Toggle "Auto Layout" or "Custom Layout"
- ○ Edit auto layout and edit custom layout
- ○ Click into sections or individual items to drag and drop to move
- ○ Click "+ Your Items" tray at the bottom of your builder
- ○ Edit the "Styling and Display"

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Getting your Account Set Up

Lesson 9: Set up your "Taxes"

- ○ Review tax (pre-made in "Startup Wizard")
- ○ Click the pre-setup option labelled "Tax"
- ○ Relabel your tax title (how you want it to show up on your invoices, ie. HST)
- ○ Add tax
- ○ Rename tax title and fill in the fields appropriately
- ○ Rename your tax grouping
- ○ Add tax to group and pick a tax from the drop-down
- ○ Choose your "Tax Method Collection"
- ○ Toggle between "On Final Payment" or "On Each Payment"

Lesson 10: Let's create "Email Templates"

- ○ Create an email grouped template
- ○ Add a new "Email Template"
- ○ Replace your email details (a client name, your name, a date, etc.) with "variables"
- ○ Make a "Pretty Email"
- ○ Click the pencil icon to customize the individual email
- ○ Click the paintbrush icon in your message content-box to customize
- ○ Group your new email template

Module 2 - almost done!

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Getting your Account Set Up

Lesson 11: Building your "Contracts"

- [ ] Add a new "Contract Template"
- [ ] Name your contract template
- [ ] Write up or copy/paste a contract in the content-box
- [ ] Replace your contract details (a client name, your name, a date, etc.)
- [ ] Click the settings bar underneath the content box to expand options
- [ ] Group your new contract

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Lesson 12: Add a "Payment Method"

- [ ] Click on the option (or the "⁝") to edit
- [ ] Title your payment method
- [ ] Toggle "Offline Payment" or "Payment Processor"
- [ ] Leave instructions for your clients to better guide them through this process
- [ ] Toggle "Yes" or "No" to set to default
- [ ] Select the icon you'd like to show up in the front-end
- [ ] Click "Create" to save

Module 2 complete - great work!

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Guiding Your Client Experience

Lesson 1: Create and view "Contact Form"

- ○ Drag and drop existing field(s)
- ○ Add additional field(s)
- ○ Edit settings/advanced settings (ie. add title, instructions, button text)
- ○ Select and edit individual/specific fields (ie. add title, size, checkbox)
- ○ Edit a field to be conditional
- ○ Embed Script Tag, iFrame, or Static Code to a website
- ○ View a front-end contact form
- ○ Fill out the linked contact form to create a sample lead
- ○ View notification for new lead
- ○ Open the "Lead" section of your Sprout Studio account

Lesson 2: Creating new "Leads"

- ○ Adjust lead column categories
- ○ Create a "Saved View"
- ○ Access adjustment options (ie. edit, email, book)
- ○ Create a bulk action (ie. changing shoot type, applying workflow)
- ○ Change status and shoot type on leads page
- ○ Click through the sub-navigation pages within the lead

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Guiding Your Client Experience

Lesson 2 (Cont'd): Creating new "Leads"

- ○ Open and edit the shoot
- ○ Explore quick actions within the lead
- ○ Manage or add lead sources

Lesson 3: Create and view emails for a client

- ○ Access email modal: Option 1
  (Leads page > Add > Send email)
- ○ Add recipient to email
- ○ Add carbon copy (CC) or blind carbon copy (BCC) to the email
- ○ Remove a recipient from the email
- ○ Apply and adjust pre-made email template
- ○ Save test email as a draft, scheduled for later, or send
- ○ Accessing email modal: Option 2
  (Sub-navigation > Emails > Add new)
- ○ Accessing email modal: Option 3
  (Leads page > Clients overview > Click name > Select (+) symbol > Send email)
- ○ Send an email to a specific contact not attached to a lead

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Guiding Your Client Experience

Lesson 4: Creating "Booking Proposals" for a client

- [ ] Edit name of booking proposal
- [ ] Customize welcome and thank you message
- [ ] Go through pre-made templates
- [ ] Choose a price list
- [ ] Add offering(s), a la carte item(s), questionnaire, and contract
- [ ] Select a payment method and create a payment schedule
- [ ] Adjust link and coupon preferences
- [ ] Make booking proposal live
- [ ] Write an email or adjust an email template

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Guiding Your Client Experience

Lesson 5: Viewing "Booking Proposals" as a client

- [ ] Flip back and forward between front-end and back-end booking proposal
- [ ] Thoroughly go through the booking proposal as if you were a client
- [ ] Test sign the contract in your booking proposal as if you were a client

Lesson 6: Create and view "Contracts"

- [ ] Select "Review & Sign"
- [ ] Type your name and accept terms
- [ ] Go onto the shoots page to see the booking status
- [ ] Check booking status in notifications
- [ ] Review contract details on the contract's page
- [ ] Review order details on the orders & quotes page

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Guiding Your Client Experience

Lesson 7: Creating new "Shoots"

- ○ Adjust shoot column categories
- ○ Filter shoots
- ○ Access adjustment options (ie. edit, email, archive)
- ○ Create a bulk action (ie. changing shoot type, applying workflow)
- ○ Click into a shoot
- ○ Click through the sub-navigation pages within the shoot
- ○ Open and edit the shoot date
- ○ Select and edit the shoot name
- ○ Select shoot type
- ○ Change shoot status
- ○ Explore quick actions within the shoot
- ○ Open and edit contact information
- ○ Create a note/log into the shoot
- ○ Explore sub-navigation (ie. emails, credits & coupons, design proofs)
- ○ Create a credit for a shoot
- ○ Preview contract from client's perspective

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Guiding Your Client Experience

Lesson 8: Creating new "Galleries" for a client

- Create and name new gallery
- Select "Gallery" or "Virtual IPS"
- Choose visibility option
- Upload photos to the gallery
- View the progress of each file
- Minimize your uploading photos
- Check the summary of your uploads
- Explore the editing tools
- Select a featured/cover image
- Copy images into a collection, download set, or download image
- Open and run through the settings section (ie. password, expiry, link, etc.)
- Customize gallery in advanced settings (ie. thumbnail type, theme, watermark)
- Explore selling and downloading options
- Create a watermark
  (Settings > Galleries & Designs > Watermarks)
- Go back into your gallery and apply your watermark
- Set/customize your default gallery email
  (Settings > Communication > Email defaults)

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Guiding Your Client Experience

Lesson 9: Viewing "Galleries" as a client

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- View your gallery
- Explore back-end vs. front-end gallery
- Configure your gallery settings to your preferred aesthetic
- Create download pre-sets (Settings > Galleries & Designs > Download pre-sets)

Lesson 10: Creating "Invitations" for a client

- Add new invitation
- Choose your available times and dates
- Modify your advanced availability
- Select your date details
- Specify your "welcome" and "thank you" messages
- Copy and paste your invitation link
- Embed an invitation onto your website
- Create multiple invitation options
- Send your invitation to a client Option 1:
  (Shoots > Select specific shoot > Add (right) > Add date > Add invitation)
- Send your invitation to a client Option 2:
  (Shoots > Select specific shoot > Dates & Tasks > Add new > Add invitation)

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Guiding Your Client Experience

Lesson 11: Creating "Invitations" as a client

- ○ View your invitation
- ○ Explore back-end vs. front-end invitations
- ○ Configure your invitation settings to your preference
- ○ Integrate your invitation calendar with your Google calendar

Lesson 12: Viewing your "Galleries" in a "Shop" as a client

- ○ Create a new gallery
- ○ Upload Images to gallery
- ○ Configure settings and preferences
- ○ Arrange your gallery into collections
  (Select images > Right click OR drag & drop > Copy to new collection)
- ○ Customize collection cover image
- ○ Select featured image for your gallery
- ○ Attach gallery to a price list and add a payment method
- ○ Publish gallery
- ○ View gallery from the client's perspective
- ○ Configure your price list for your galley
- ○ Configure visualizer for your gallery
- ○ Create packages in your price list

Module 3 - nice job!

Checklist

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Guiding Your Client Experience

Lesson 13: Creating an "Order" for a client

- Add and name a new order
- Choose a price list
- Create an invoice footer
- Specify the payment schedule
- Configure order settings (ie. currency, billing contact, shipping contact)
- Add items into the order
- Configure your payment/cost preferences
- View invoice from the front-end
- Create a partial payment with a payment schedule

Lesson 14: Create and View "Design Proofs"

- Create a new design proof
- Upload pre-made designs
- Set default design proof email
  (Settings > Communication > Email defaults)
- View design proof from the client's perspective
- Click and add test comments on the design proof
- Send revision suggestions and view revisions
- Make revisions, upload the new design, and send revised proof

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Guiding Your Client Experience

Lesson 15: Create and view "Questionnaires"

- ◯ Create a new questionnaire
- ◯ Build and organize your questionnaire
- ◯ Create a template questionnaire for future shoots
- ◯ Apply a questionnaire to a shoot
- ◯ Apply a template questionnaire to a shoot
- ◯ Insert questionnaire into an email
- ◯ View questionnaire from the front-end
- ◯ Submit questionnaire from the front-end
- ◯ Update questionnaire from the front-end

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Lesson 16: Viewing the "Client Portal" as a client

- ◯ Find client portal link
  (Main navigation (left) > Shoots > Overview > Send email > Variable > Brand)
- ◯ Access the front-end client portal
- ◯ Access the back-end client portal (impersonate mode)
- ◯ Email test list of shoots
- ◯ Open the list of shoots in your email
- ◯ Follow the link and go to the front-end client portal

Module 3 complete - great work!

Checklist

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Automate Your Business

Lesson 1: Intro to Automation

- [ ] Explore automation navigation in settings

Lesson 2: Automate by creating "Workflows"

- [ ] Make each email template/questionnaire template/status you want to automate
- [ ] Create a new lead workflow
- [ ] Add an immediate step to create a task
- [ ] Add a relative step to send an email
- [ ] Add an immediate step to change status
- [ ] Drag & drop fields
- [ ] Create a new shoot workflow
- [ ] Make a relative task to send a questionnaire
- [ ] Edit the lead workflow
- [ ] Make an immediate step to apply your shoot workflow

Checklist

Sprout School

Automate Your Business

Lesson 3: Automate by applying "Workflows"

- [ ] Add a "Default Workflow" in the lead workflows section
- [ ] Set your workflow to apply when your specific shoot type comes in
- [ ] Create a booking proposal in a lead
- [ ] Apply your shoot workflow in the settings
- [ ] Apply a lead workflow in the "Dates & Tasks" section
- [ ] Manage the steps being applied to the lead
- [ ] Check off or remove your tasks on your lead timeline
- [ ] Go to leads > Emails to see the sent email from your workflow
- [ ] Add a new lead using the shoot type you used for your default workflow

Lesson 4: Automate using "Sprout Assistant" - Part 1

- [ ] Open "Invoice & Orders" and open "Reminder that an Invoice is Due Soon"
- [ ] Set the reminder time frames
- [ ] Edit the email subject/title and the variables in the emails (if needed)
- [ ] Swap the header image of the email
- [ ] Swap between "Dark/Light Mode" and the font type
- [ ] Edit the email body
- [ ] Click settings and set the email to "Live"

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Automate Your Business

Lesson 4 (Cont'd): Automate using "Sprout Assistant" - Part 1

- [ ] Toggle the "Enabled by Default" on
- [ ] Click the "Enable All" button to add that email to all orders
- [ ] Click the "Setup" button
- [ ] Enable/disable "Assistant" emails in bulk
- [ ] Go to your dashboard and click "View Upcoming Activity" to see all scheduled emails

Lesson 5: Automate using "Sprout Assistant" - Part 2

- [ ] Edit one of your order "Assistant" emails
- [ ] Go into an order
- [ ] Open the "Assistant" tray and open the reminder
- [ ] Change the reminder
- [ ] Go back into your "Assistant" template and see that the template is the original
- [ ] Go back to your order and uncheck/check different reminders to turn them on and off
- [ ] You can configure each "Assistant" email per asset (gallery, date, questionnaire) using the same idea

Module 4 complete - *great work!*

Checklist

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Market Your Photography Business

Lesson 1: Intro to "Email Marketing"

- ○ Add a new "Email List"
- ○ Set your list to automatically add existing contacts
- ○ Go to your email list to see the emails that were added
- ○ Save the email list
- ○ Add a new "Email Drip Campaign"
- ○ Set your campaign to use your new email list
- ○ Go to the email list section and add in any new contacts
- ○ Go to the email messages section to add your email message

Lesson 2: Build your "Email List"

- ○ Create a new email list and add a title to your list
- ○ Leave the auto-add set to none (we're building out a signup form to collect emails)
- ○ Go to the "Signup Form" section
- ○ Add a pop-up form
- ○ The configuration is on the left and the preview is on the right
- ○ Set custom configurations to customize the form to look how you'd like it to look
- ○ Click "Save" to save your form
- ○ Click the options next to the form and click "Embed" to get the code to put the form on your website

Checklist

Sprout School

Market Your Photography Business

Lesson 3: Build your "Email Campaign"

- [ ] Add a new "Email Drip Campaign"
- [ ] Add a name to your campaign
- [ ] Add your email list to your campaign
- [ ] Go to the email lists section to see the emails that are attached to the campaign
- [ ] Go to the email messages section and create a new email message
- [ ] Add some text to your email
- [ ] Add another email to your campaign
- [ ] Set when the second email is sent after the first email
- [ ] Create a few more emails and set the frequencies for them too
- [ ] Save your work

Lesson 4: Build a "Designer Email"

- [ ] Enter your email campaign from the previous lesson
- [ ] Edit the first email in the email messages section
- [ ] Set the email to "Designer" and click "Add Designer Email" button
- [ ] Click the "Sections" menu on the bottom
- [ ] Add a few different options from the menu
- [ ] Drag and drop your fields to arrange them how you'd like

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Market Your Photography Business

Lesson 4 (Cont'd): Build a "Designer Email"

- Click into a section and modify the field on the left-sidebar
- Swap different layout options to get one you'd like
- Click "Save" in the bottom right corner to save your work
- Go to Settings > Communication > Designer email templates
- Click "+" and click "Add from Template Library"
- Grab a few designer email templates and save them to your account
- Go back to your email campaign
- Edit one of your campaign emails
- Set it to "Designer" and apply your template

Lesson 5: Send a "Bulk Email or Blast"

- Add a new "Single Bulk Email"
- Give your bulk email campaign a title
- Click "Auto-Add" and change it to gallery
- Set your settings underneath "Auto-Add"
- Open the "Email Message" section
- Edit the email and set it to "Pretty Email"
- Set your header to "Automatic Email Header"
- Save the email message and send your email campaign

Module 5 complete - great work!

Checklist

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How To...

Lesson 1: How to "Fulfill your Prints with a Lab"

- [ ] Set up lab fulfillment in the price list
- [ ] Choose what lab you would like to integrate with
- [ ] Decide how much control you want to have (manual, auto, with delay)
- [ ] Select where your orders go (drop ship to me, drop-ship to the client)
- [ ] Add any extras from the lab
- [ ] Add new lab print
- [ ] Turn off print sizes you are not interested in offering
- [ ] Turn off paper types you are not interested in offering
- [ ] Name and save lab print
- [ ] Head to your galleries
  (Main navigation > Galleries)
- [ ] Apply lab print price list to a gallery
- [ ] Open gallery
  (Three dots > View)
- [ ] Test order a print on front-end
- [ ] Review the order on the back-end

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How To...

Lesson 2: How to "Self Fulfill your Prints"

- [ ] Go into front-end gallery
(Galleries > View)
- [ ] Test order a print
- [ ] Review order on the back-end
- [ ] Select the process order button
- [ ] Ensure your photos are the proper resolution
- [ ] Approve test order
- [ ] Generate ZIP file
- [ ] Download ZIP file

Lesson 3: How to "Merge Your Clients"

- [ ] Visit your contacts page
- [ ] Select "Merge Contact"
- [ ] Individually select two contacts to merge together
- [ ] Select "Contact Merge Wizard"
- [ ] Flip between "Match Email" and "Match Name"
- [ ] Choose primary contact
- [ ] Go to the "Leads" section
(Main navigation > Leads > Select specific lead)
- [ ] View "we found a similar contact" notification

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How To...

Lesson 4: How to "Set Up Mini-Sessions"

- Create an invitation with mini-session parameters
- Adjust invitation settings
- Test view the front-end invitation
- Go into booking pages and create a new booking page
- Add your mini-session invitation to the booking page
- Adjust booking page settings
- Create a new shoot type called "Mini-Session"
- Submit the front-end booking page
- Review and sign booking page on the back-end

Lesson 5: How to "Give a Credit"

- Add a new credit
- Select a price list and add an item
- Go into the shoot overview
- Go through the client portal from the front-end
- Select the gallery and choose "Credit available" notification
- Submit photos for the credit
- Go into the back-end "Credits & Coupons" section for review

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How To...

Lesson 6: How to "Give or Sell a Pack of Digital Files"

- Add and edit a new credit
- Add item
- Select "Digital" and quantity
- Create the credit
- Check price list
  (Settings > Pricing > Price lists)
- Ensure digital fulfillment is turned on
- Select automation type (auto vs. manual)
- View download presets
  (Settings > Galleries & Designs > Download presets)
- Return back to shoot section to view credit
- Go to the overview section to view the gallery as a client
- Select "credit available" notification
- Specify and submit digital files credit
- Enter email and download the ZIP file
- Return to the back-end "Credits & Coupons" section
- Select shoot and click "go to gallery"
- Review digital file credit
- Add select images to new preset
- Test email preset to client

Module 6 complete - great work!

you completed

Sprout School

CONGRATULATIONS!

MAKE SURE TO DOWNLOAD YOUR CERTIFICATE AND SHARE THE GOOD NEWS:

Sprout Community: facebook.com/groups/getsproutstudio
Tag us on Instagram: @getsproutstudio

SUCCESS LOOKS GOOD ON YOU!

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