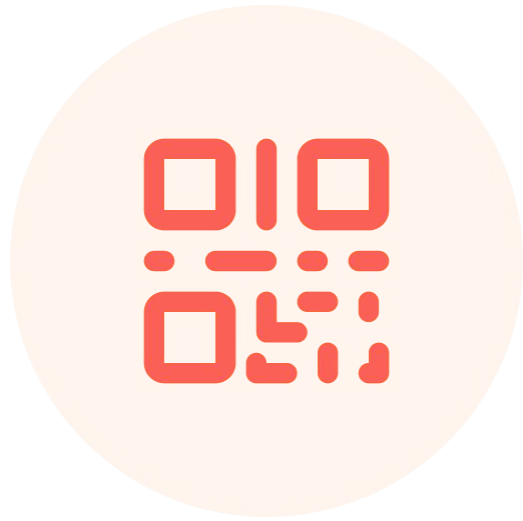


A Tech Guide for Private Practitioners

Melissa A. Venable, PhD

NCDA CPI - February 2023

slido



Join at slido.com
#2259078



slido



Audience Q&A Session





This Photo by Unknown Author is licensed under [CC BY-NC](#)

Setting
the
Stage:

**The. Struggle.
Is. Real.**

slido



What business-related problem are you trying to solve right now?



Before Adopting a New Tool

Conduct an inventory of your existing tools, accounts, licenses, subscriptions, etc.

- What do you use regularly?
- What could you start using?
- What could you give up?
- What's working/not working?
- What features and functions are available?



Before Adopting a New Tool

Ask yourself a few questions ...

- ❑ Does it solve a problem?
 - ❑ Increase efficiency?
 - ❑ Free up time and/or resources for other tasks?

- ❑ Will there be a learning curve?

- ❑ How much will it cost?



Before Adopting a New Tool

Ask yourself a few questions ...

- ❑ How does the tool integrate with my existing tools, processes, and systems?
- ❑ What platforms does it work with?
- ❑ Where can I get support?





How can technology *help* your practice?

- Run your business
- Grow your business
- Work with clients
- Complete daily tasks



~ Stefan Palios



Run Your Business

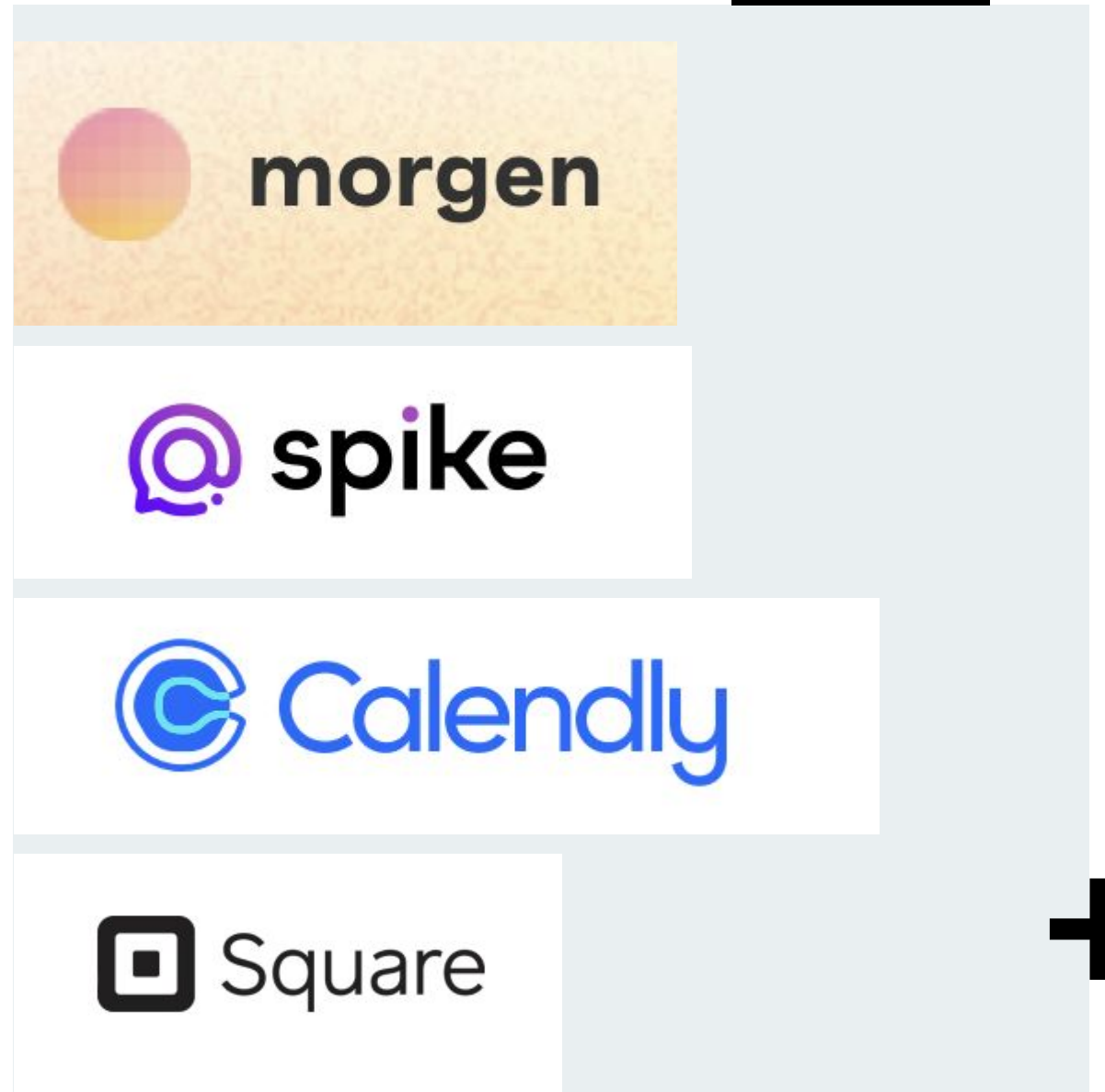


Scheduling

- ❑ Time management
- ❑ Task management
- ❑ Appointment booking
- ❑ Meeting invitations
- ❑ Real-time chat
- ❑ Video calls

But ... can it handle *multiple calendars*?

And ... is it *mobile-friendly*?





calendarbridge

Step 1

Link your Microsoft and Google accounts. We never see your credentials.

Syncing

Google

Email | Pass

Microsoft

Email | Pass

Step 2

Select calendars to sync and set your privacy controls so your peers never see sensitive calendar data.

Select Calendars

SOURCE CALENDAR

Work

Personal

DESTINATION CALENDAR

Work

Personal

Step 3

You're done! CalendarBridge keeps your calendars in sync in real time so you never get double-booked again.

New Sync

✓ Calendars

✓ Sync options

✓ Sync Privacy

Create Sync



calendarbridge



Home



Sync



Schedulers



Group Booking



Accounts



Billing



SUN
12

MON
13

TUE
14

WED
15

THU
16

FRI
17

SAT
18

Second Sunday on Kin

Saint Leo Office Hours

Salesforce Regional Kickoffs (copy)

Valentine's Day

BDC TECHConnect(53)

workout / meditation (copy)
7:30 - 9am

Coffee w/ EB (copy)
8 - 9am

workout / meditation (copy)
7:30 - 9am

workout / meditation (copy)
7:30 - 9am

workout / meditation (copy)
7:30 - 9am

Podcast heads-up (copy)

Ginger - 10:30 (copy), 9:

BDC ED / Board Chair M
9 - 10am

Allergy Shot (copy)
10 - 11am

NCD A Staff Meeting (co
11am - 12pm

Pubs chat with Deneen

BDC Board Interview - J
1pm, https://us02web.z

Hub Video (copy)
2 - 3pm

BDC Board Interview - J
2:15pm, https://us02we

Telfair RSVP (copy), 4:3

workout / meditation (copy)
7:30 - 9am

NCD A Touchbase Zoom

You're Invit Kindred Wa
(copy)
12 - 2pm
RV4 Plaza

NCD A On-Demand:
CDCV - Check In
(copy)
10 - 11:30am

NCD A - Dig
12pm, https

BC Editorial Monthly (co

SLU (copy)
3:30 - 5pm

TECHConnect (copy)
5:30 - 7:30pm

EDU No Zoom
Meetings Block (copy)
9am - 12pm

Vet - Griff and Cat
Stevens (copy)
9:30 - 11am

Podcast Prep (copy), 2:3

NCD A Podcast Recordin
3 - 4pm



Billing and Invoicing

- ❑ Payment schedules and reminders
- ❑ Integration with other apps (e.g., PayPal, Stripe, Apple Pay, Google, Quickbooks)
- ❑ Contract generation
- ❑ Branding
- ❑ Billing history
- ❑ Reporting

Categories, Ratings, Reviews:

<https://www.getapp.com/>



HoneyBook



Jobber



Odoo



Zoho Invoice





Grow Your Business

+

Build Your Reputation as a Career Development Expert

- ❑ Join conversations
- ❑ Provide quotes
- ❑ Talk to the media
- ❑ Share your story, opinions, and insights



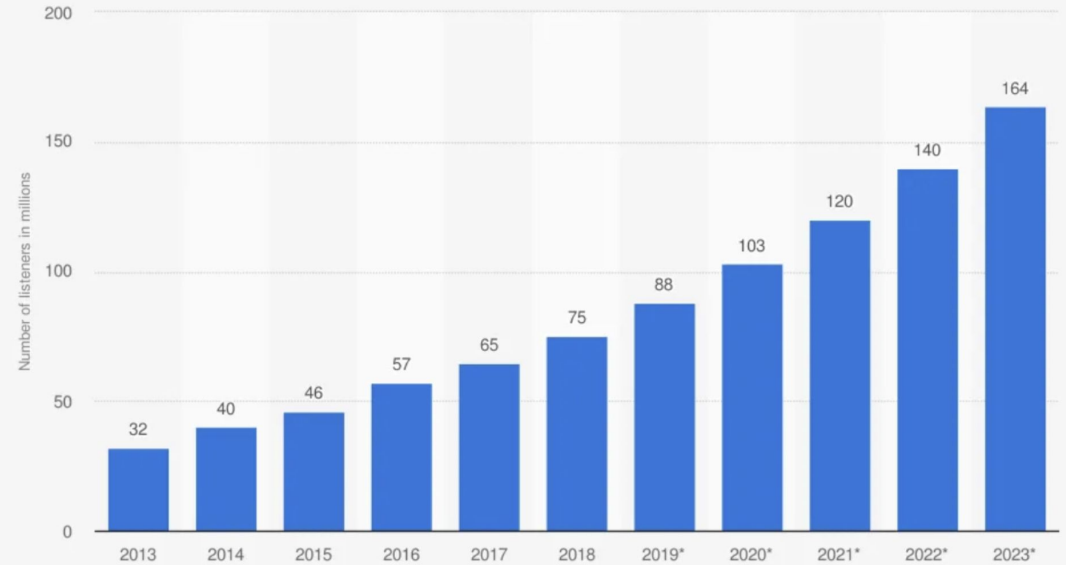
DIGITAL MARKETING LAB PRESENTS

HOW TO BECOME A PODCAST GUEST



<https://bit.ly/3lx6vqq>

Number of monthly podcast listeners in the United States from 2014 to 2023 (in millions)



Sources
Activate; Edison Research; PwC
© Statista 2020

Additional Information:
United States; Activate; Edison Research; PwC; 2019; 12 years and older

1. Podcast Reaches Out to Guest
2. Guest Reaches Out to a Potential Podcast
3. Guest and Podcast are Connected by Third Party Platform





<https://app.qwoted.com/>

- ❑ Create your profile
- ❑ Get email notifications
- ❑ Respond to writer / reporter inquiries



Melissa Venable

Education Advisor and Principal Writer
at [BestColleges.com](#)



<https://www.linkedin.com/in/melissavenable/>

[@Melissa_Venable](#)

[Beaufort, SC, USA](#)

EXPERT ON

[#College](#) [#University](#) [#DistanceEducation](#)

[#AlternativeEducation](#) [#CareerCoach](#)

Melissa A. Venable, Ph.D. is an education advisor and principal writer for [BestColleges.com](#) where she leads a research initiative reporting trends in online education, student demographics, and car...



Clear Search

careers



Dr. Kyle Elliott
Founder and Career Coach at CaffeinatedKyle.com

Santa Barbara, CA, USA

EXPERT ON

#LinkedIn #Unemployment #MentalHealth #LGBT

#Stigma

...leading publications. Frequently write and speak about high tech and Silicon Valley; job search and careers; employment and labor trends; mental health and stigma; and diversity, equity, inclusion, and belonging...

Contact

Quick to Respond Frequent Source



Mary Guirovich
CEO/ Holistic Career Advancement Strategist at My Promotion Plan

San Antonio, TX, USA

EXPERT ON

#GlassCeiling #Christianity #Negotiation #Leadership

#PersonalDevelopment

...creator of the My Promotion Plan® career advancement system, empowering women to advance their careers and increase their income; impact while creating a life they love! Mary is the.

Contact

Frequent Source



Joseph Liu
Host at Career Relaunch® podcast

London, UK

EXPERT ON

#PublicSpeaking #Selfemployment #VirtualWork

#Career #ConferenceSpeakers

Joseph Liu is dedicated to helping people relaunch their careers to pursue more meaningful work. He's a career change consultant, professional speaker, and host of the Career Relaunch Podcast...

Contact

Frequent Source



James 'JR' Lowry
Founder / Investor at Pathwise.io

London, UK

EXPERT ON

#ChiefOperatingOfficer #FinancialServices #COO

#Substitute #Investor

J.R. founded and began backing PathWise in 2021 as a "passion project" to help others find purpose and joy in their careers. He has had the fortune of participating.

Contact

Frequent Source



Linda Greenfield
Owner, Career Counselor at Essential Career Counseling

Los Angeles, CA, USA

EXPERT ON

#LinkedIn #JobSatisfaction #CareerDevelopment

#CareerCounseling #Interview

Linda Greenfield, M.S., M.B.A., the owner of Essential Career Counseling, is dedicated to assisting her clients with positive change in their careers. She provides assistance with best...

Contact



Laura Smith-Proulx
Executive Resume Writer; LinkedIn Writer; Job Search, Interview, & Career Expert at AnExpertResume

Denver, Colorado, United States

EXPERT ON

#LinkedIn #Job #Career #Jobs #JobHunting

Job search, careers, resume, and LinkedIn expert. Former recruiter with passion for personal branding and successful job search techniques. ...

Contact



FORTUNE

Fortune

ONLINE/PRINT EXPERT REQUEST

Looking for advice on how to negotiate a severance package

I am looking for advice on if/how you negotiate your severance package if you are laid off....

#Unemployment #Layoff #SeverancePackage

#InvoluntaryUnemployment #Layoffs

Filed: Thu Feb 16(21 hours ago)

Deadline: 1:00 pm Feb 20(in 3 days)

Newsweek

Newsweek

ONLINE/PRINT EXPERT REQUEST

US employment/career expert needed for article on unfair termination

...has a quick turnaround time. Please only pitch if you can get your response across by 09:00am Friday, EST. #careerexpert #career #HR #employmentexpert #fired #wrongfultermination #mentalhealth #mentalhealthatwork #toxicboss #toxicworkculture ...

#Unemployment #Employment #HR #Career

#Workplace

Filed: Wed Feb 1(17 days ago)



Forage

The Forage

ONLINE/PRINT EXPERT REQUEST

Top business etiquette tips for professionals new to the workplace

Looking for career coaches and HR managers to share tips on business etiquette, specifically for people who are entering the workforce. —What are your top 1-3 business etiquette tips...

#HumanResources #Business #CareerCounseling #HR #Workplace

Filed: Wed Feb 15(2 days ago)

Deadline: 11:00 am Feb 20(in 3 days)





Forage

6 Ways to Stop Saying 'I Don't Know What Job I Want'



Written by [Zoe Kaplan](#)

Edited by [Emily Courtney](#).

Updated on January 25, 2023

Wolfe goes on to say that your work should also be connected to your personal values, who you like working with, and the organization – not just the job title, as career tests will typically only give you.

Others say career tests can help you in numerous ways, “whether you are in the exploration stage, looking to widen the options available, or in the decision-making stage, trying to narrow your focus,” [Melissa Venable](#), education advisor and principal writer at BestColleges.com, says.

Articulate Your Business Model

Lean Canvas

“The lean canvas ... template provides a straightforward way to **evaluate your business opportunities**.

It helps you break down your business idea into key factors and gives you a **visualization of your business idea**.

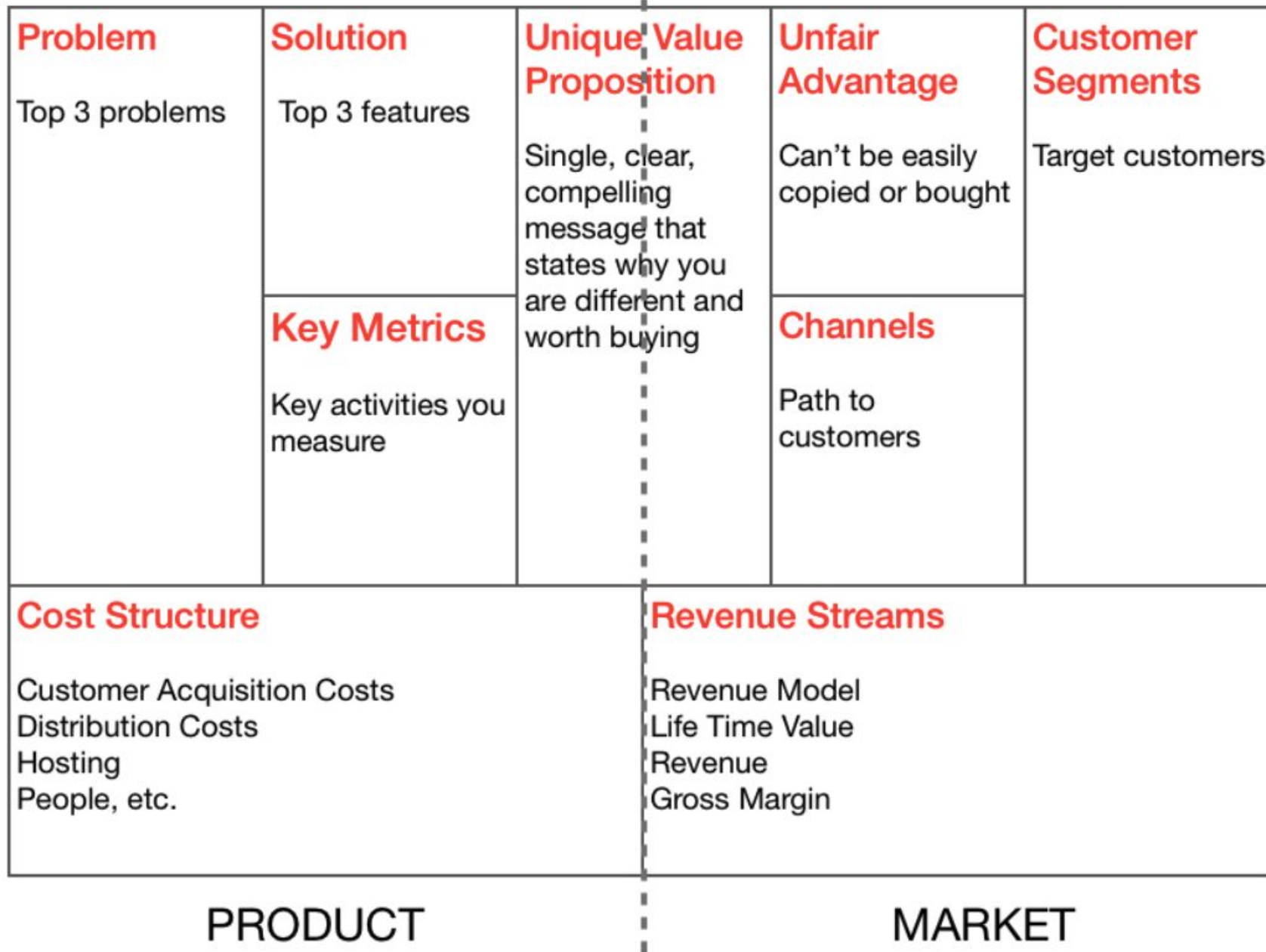
It’s also easier for others to read through and give feedback on than a standard business plan.”

~ [Mural.com](https://mural.com)

The Mural logo features the word "mural" in a lowercase, sans-serif font. The letters are colored: 'm' is red, 'u' is blue, 'r' is black, 'a' is green, and 'l' is purple.The Miro logo consists of the word "miro" in a lowercase, dark blue, sans-serif font.The Canvanizer logo features the word "Canvanizer" in a stylized, hand-drawn, black font. The letters are thick and have a slightly irregular, sketchy appearance.

Brainstorm better concepts. Together with your team





Source: [Running Lean](#)

More info:

Intro to Lean Canvas
[@Steve Mullen](#)

Mapping a Career You Love
[Michelle Hiland](#)

Career Guidelines Business Canvas Model
[Canvanizer](#)

[Career Design Canvas](#)





Work with Clients

Online Platforms

- ❑ Teaching - courses, workshops
- ❑ Building communities or groups
- ❑ Communication tools
- ❑ Materials - access, storage

The Udemy logo, featuring a purple graduation cap icon above the word "udemy" in a lowercase, sans-serif font.The Teachable logo, featuring the word "teach:able" in a white, lowercase, sans-serif font on a dark green background.

Canvas

[Canvas Free for Teachers](#)

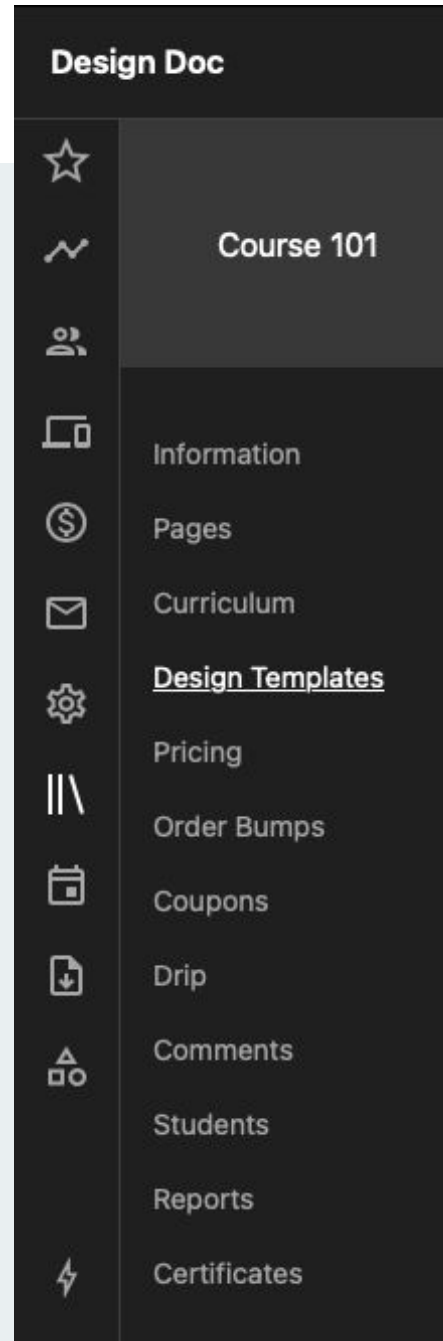
- ❑ Course creation
- ❑ Quizzes and assessments
- ❑ Mobile app
- ❑ Learning tracking
- ❑ 50 MB/course file storage

The screenshot displays the Canvas LMS interface. On the left is a dark sidebar menu with icons and labels for: Account, Dashboard, Courses, Calendar, Inbox, History, Commons, and Help (with a notification badge showing '10'). The top right shows a breadcrumb trail: 'Course 101 > Modules'. The main content area lists various navigation options: Home, Announcements, Assignments, Discussions, Grades, People, Pages, Files, Syllabus, Outcomes, Rubrics, Quizzes, Modules (highlighted with a vertical bar), BigBlueButton, Collaborations, Attendance, New Analytics, and Settings. A large grey rectangular area on the right side of the page is partially obscured by a black plus sign (+) in the bottom right corner.

Teachable

<https://teachable.com/>

- ❑ Landing page
- ❑ Payment processing via PayPal
- ❑ Custom domain
- ❑ Subscription-based membership
- ❑ Email lists
- ❑ Coaching function - 1:1, notes, milestones, tracking

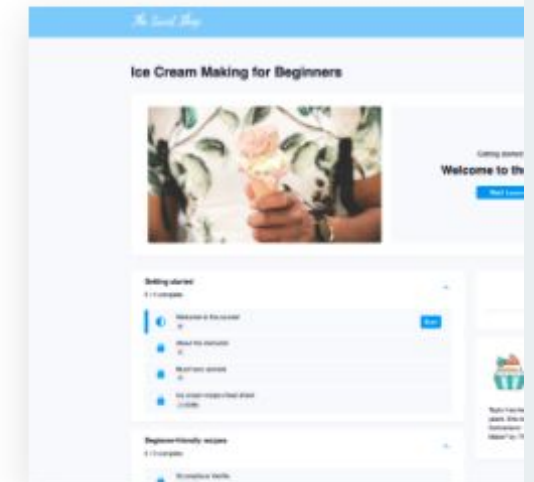


Design Templates

Manage your course des

Activate a template for your course ov

Active Template



Colossal Active

A robust view that showcases your cu information and the author bio.



What is the best online course platform?

~ [Zapier](#)

- [Udemy](#) for launching your first course
- [Skillshare](#) for teaching creative skills
- [Teachable](#) for creating an online school with advanced marketing
- [Podia](#) for selling digital products and memberships
- [Thinkific](#) for building a course from scratch
- [Kajabi](#) for marketing a course on autopilot
- [Mighty Networks](#) for building a paid community
- [Simplero](#) for managing your business
- [TrainerCentral](#) for a simple online course platform



A whiteboard is shown, densely covered with numerous colorful sticky notes in shades of yellow, green, blue, pink, and orange. The notes are arranged in a somewhat organized but busy manner, suggesting a project plan or a list of tasks. A semi-transparent dark grey horizontal bar is overlaid across the middle of the image, containing the text 'Complete Daily Tasks' in white. In the top right corner of the whiteboard, there is a white horizontal line. In the bottom right corner of the dark grey bar, there is a white plus sign.

Complete Daily Tasks



Project Management Systems

- ❑ Automated tasks
- ❑ Timelines, Milestones
- ❑ Integration with other tools (e.g., Slack, Google Calendar)
- ❑ Communication tools
- ❑ Collaborative workspace
- ❑ Kanban boards





<https://todoist.com/app/>

- ❑ Sub-tasks, comments
- ❑ Templates
- ❑ Sync across devices
- ❑ Set goals

You can create projects to:

- ✓ Make a teaching plan
- ✓ Track a marketing campaign
- ✓ Share a grocery list



1-on-1 Meeting

Ensure priorities are clear and keep a pulse on how your...



Accounting Tasks

Create a system to keep your books, receipts, and invoices...



Annual Review

Use this template to review everything – big and small –...



Appointments

Never forget (or forget to prepare for) another meeting o...



Blog Post

Go from inspiration to publication with this template...



Book Writing

Plan your writing and organize your schedule as you draft your...



Bug Tracking

Craft an organized bug tracking system to keep things in order...



Business Travel Packing

Never forget your laptop charger, lucky shoes, or...



Campaign Tracker

Track ad campaigns and keep a pulse on your marketing...



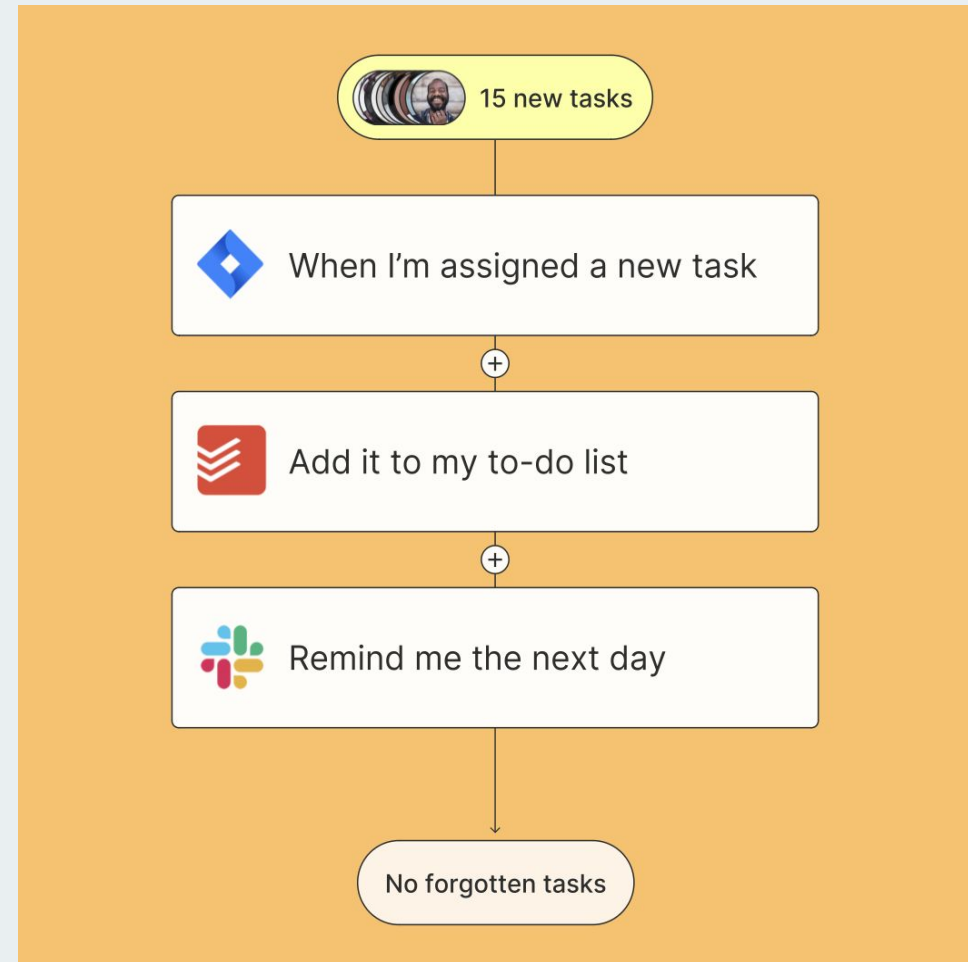
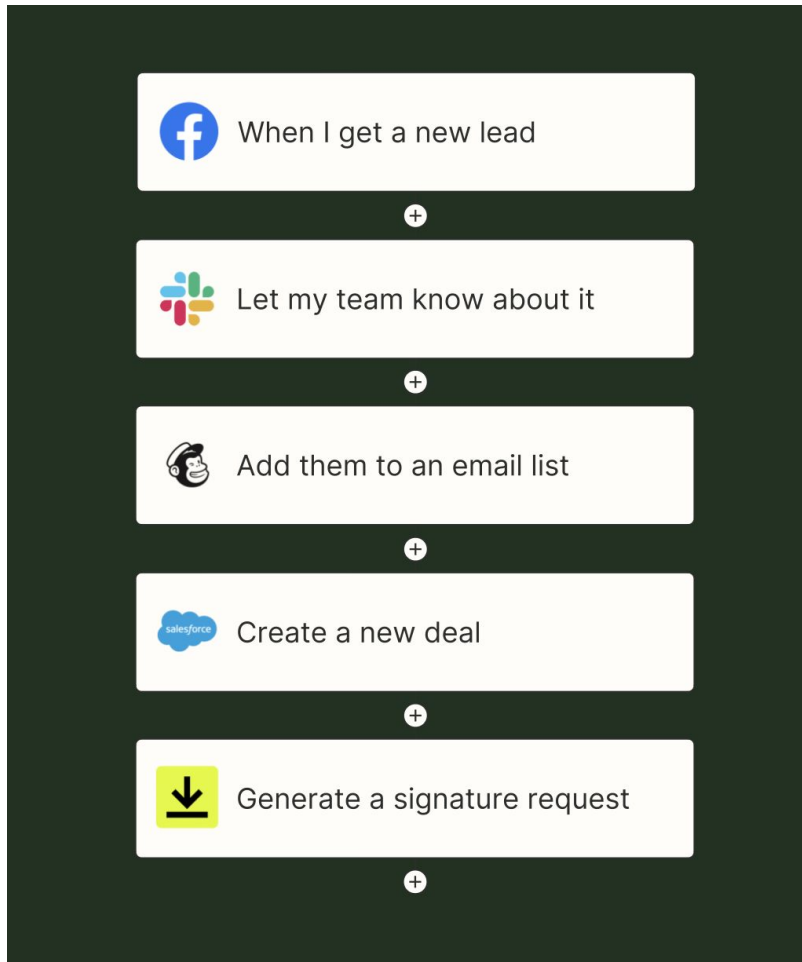
Class Planning

Keep all the many details of your class plans organized an...





Zapier empowers you to automate your work across 5,000+ apps—so you can move forward, faster.



Automation for all

From side hustlers to enterprise leaders, Zapier connects your work apps so you get more focus and less frustration.

Marketing 

Business owner 

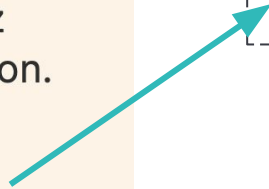
IT 



What should I automate?

Not sure where to start with Zapier? Take our quiz and get a personalized automation recommendation.

[Take the quiz](#)



We recommend: Send reminders to everyone who needs them based on your calendar.

Check your inbox for more info and resources. Or click the button below to learn more right now.



[Get started](#)

press **Enter** ↵



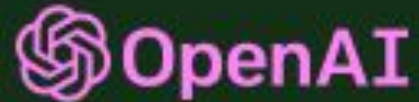
The image features a close-up, high-angle view of a complex printed circuit board (PCB). The board is dark, with intricate copper traces and various electronic components. A prominent feature is a large, glowing blue area on the right side, which displays a grid of binary code (0s and 1s) in a bright, neon-like font. The overall lighting is a deep blue, creating a high-tech, digital atmosphere. A semi-transparent dark grey banner is positioned across the lower half of the image, containing the text 'For Further Exploration ...' in a clean, white, sans-serif font. To the right of the text, there is a white plus sign (+) and a white horizontal bar above it, suggesting a link or further information.

For Further Exploration ...



Artificial Intelligence (AI) Tools

- ❑ Social media posts
- ❑ Press release drafts
- ❑ Draft a meeting agenda
- ❑ Outline a blog post
- ❑ Website copy
- ❑ Newsletter copy
- ❑ Email drafts
- ❑ Image creation
- ❑ Image editing
- ❑ Transcribe audio
- ❑ ... ?

The logo for OpenAI, featuring a purple knot icon and the text "OpenAI" in a purple sans-serif font.The logo for QuillBot, featuring a green circular icon with a white robot head and the text "QuillBot" in a green sans-serif font.The logo for Text Optimizer, featuring a blue and orange pencil icon and the text "Text Optimizer" in a white sans-serif font.The logo for Grammarly, featuring a green circular icon with a white 'G' and the text "grammarly" in a black sans-serif font.The logo for Murf.AI, featuring a yellow and black icon and the text "MURF.AI" in a white sans-serif font.The text "DALL·E 2" in a black serif font.The logo for Trint, featuring the text "trint" in a bold, black, lowercase sans-serif font.

ChatGPT



Examples

"Explain quantum computing in simple terms" →

"Got any creative ideas for a 10 year old's birthday?" →

"How do I make an HTTP request in Javascript?" →



Capabilities

Remembers what user said earlier in the conversation

Allows user to provide follow-up corrections

Trained to decline inappropriate requests



Limitations

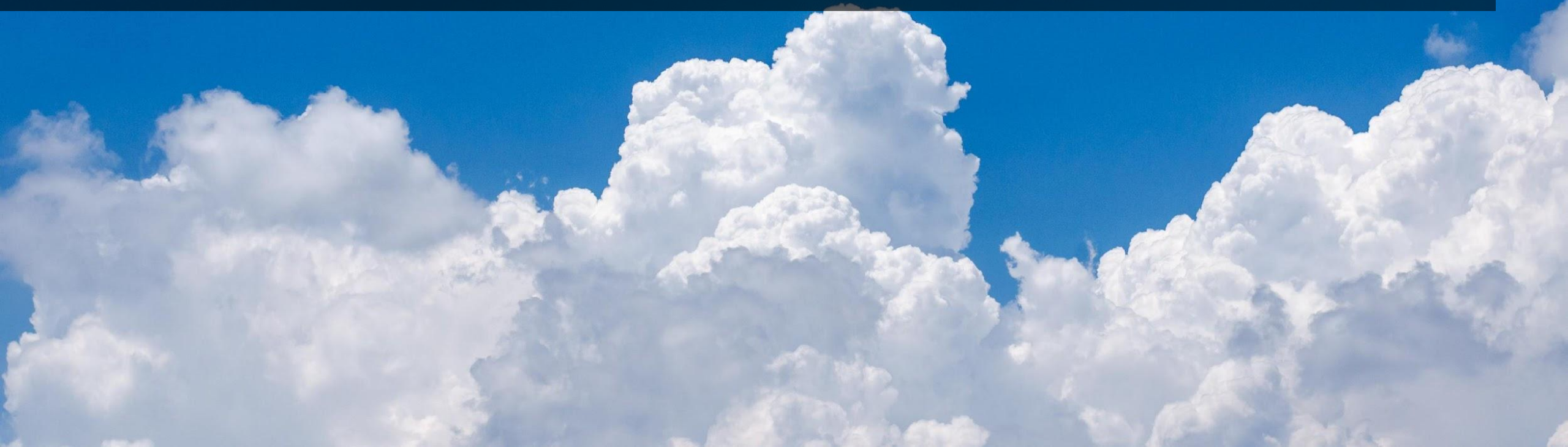
May occasionally generate incorrect information

May occasionally produce harmful instructions or biased content

Limited knowledge of world and events after 2021



Avoid Tech Fatigue



Try a TECH-Free Retreat

FCD CAREER CLASS

ONLINE LEARNING

WORKSHOPS & TRAINING



ABOUT

SHOP

RESOURCES

CONTACT

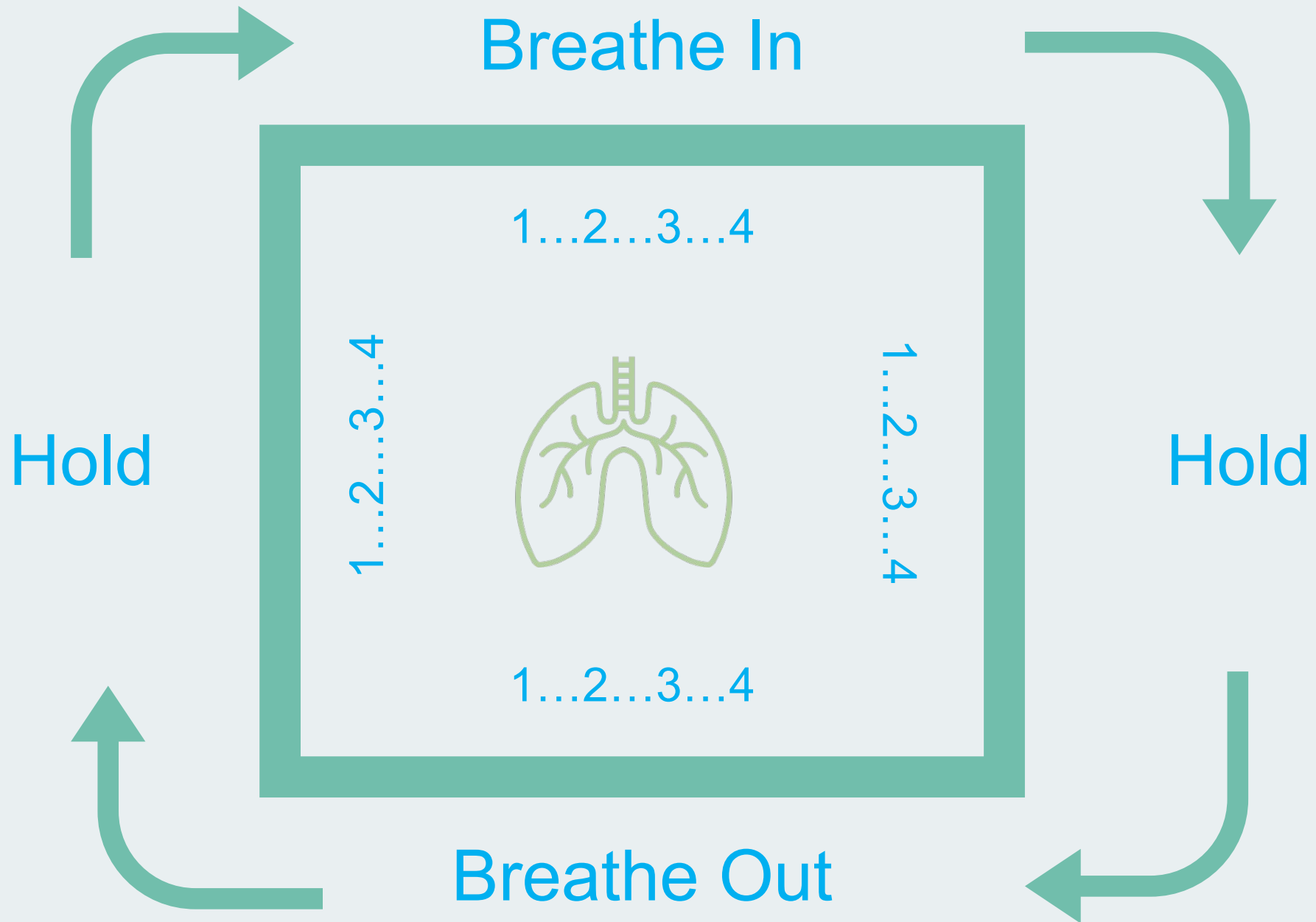
Six reasons why I do a tech-free retreat

August 10, 2020 by [Jim Peacock](#) — 1 Comment

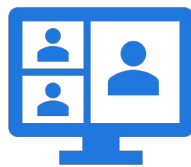
1. Simplifying
2. Create/Review your plan for next 90 days
3. Look at the big-picture – work, career, life
4. Writing
5. Stretch out of comfort zone
6. Reading

<https://peak-careers.com/tech-free-retreat-2/>





Set Realistic Expectations & Take Care of Yourself



Self-Care Tips for Career Development Professionals: Managing Stress and Building Resilience – Dr. Sharon Givens & Marty Apodaca – NCDA Webinar ([recorded, free access](#))

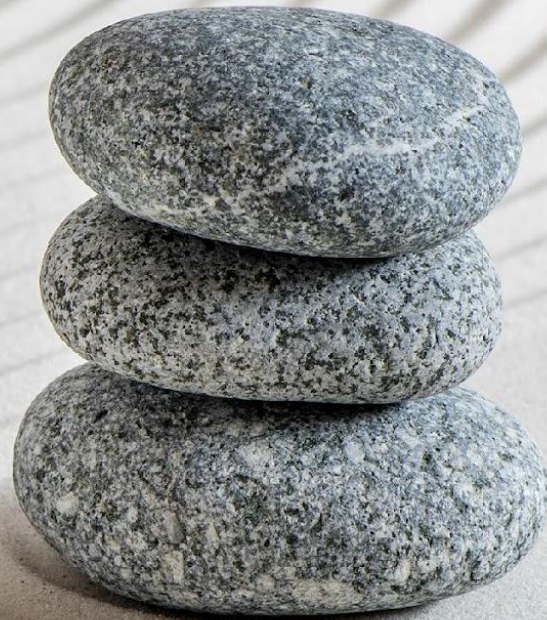


Wellness for Educators – well4edu.org – Explore the online collection of events, microcourses, resources, and podcast episodes.



The Mayo Clinic's Guide to Stress-Free Living – [Dr. Amit Sood](#)

What Are Your
Self-Care
Non-Negotiables?



Technology Committee

Chairpersons:

[Jaana Kettunen](#)

[Kathy Battee-Freeman](#)

Career Convergence Web Magazine

[Independent Practice Column](#)

[Tech Tips Archive](#)

[Webinar Series](#)

The Age of Social Media

Tried and True or Something New?

What's New on LinkedIn?

Self-Care Tips for Career Professionals



Thank you!



[in/melissavenable](https://www.linkedin.com/in/melissavenable)



<https://designdoc.me/>

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- mvenable@ncda.org
- melissa.a.venable@gmail.com



slido



Audience Q&A Session

