

Ideas

# 3 Ways I Stay Organized As a Department of One

Big teams are amazing, but sometimes you're flying solo and need to use every tool at your disposal.

By [Anna Burgess Yang](#)  
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I've spent 96.7% of my career working for small companies (yes, I did the math). Prior employers have ranged from 18 to 30 employees—firmly in the small business category.

When I joined Campfire Labs in October of 2021, I felt that I was well-prepped for working with a small but mighty team. The new element was operating in a department of one. I was filling a new role as the company's first Account Manager, and the only person fully dedicated to the sales function.

In my role, I get to talk to other small teams, including content teams of one who are building out their company's first ever content marketing function. I know how easy it is to watch your to-do list roll over on to a second page, and how important it is to develop processes and find helpful tools that create more time for meaningful work.

Fortunately, I am a total nerd when it comes to productivity tools.

I spent seven years as a product manager at a fintech. When I joined Campfire Labs, a lot of my old instincts immediately kicked in: organization, prioritization, follow-up... and not relying on my brain to keep it all straight. I wanted to ease the burden of necessary tasks that would otherwise be tedious or manual.

I brought in some tools—some new, some I was familiar with—to help me get the job done.

## 1) Protect my calendar (yet allow flexibility)

As anyone in sales can attest, speed to lead is key. A potential lead comes in and you want to talk as soon as possible. A Calendly link that shows no open slots for days won't cut it.

Yet, I also have a lot of time-sensitive tasks. Prospective client needs a proposal? I need to write something up. Client asks for a contract? I need to deliver that ASAP. As much as I need my calendar to be flexible for calls with clients and customers, I also need to guard pockets of time in my day for other parts of my job.

I needed a calendar fairy. Or an AI-powered calendar assistant.

This is extra true in our small organization where other people in the organization depend on information from the sales function. Our CEO and GM keep an eye on the sales pipeline, which I update. I prepare a "handoff" to our editorial team when new clients are signed so they can be prepped for a kickoff call. And very little can be predicted in advance.

I needed a calendar fairy. Or an AI-powered calendar assistant.

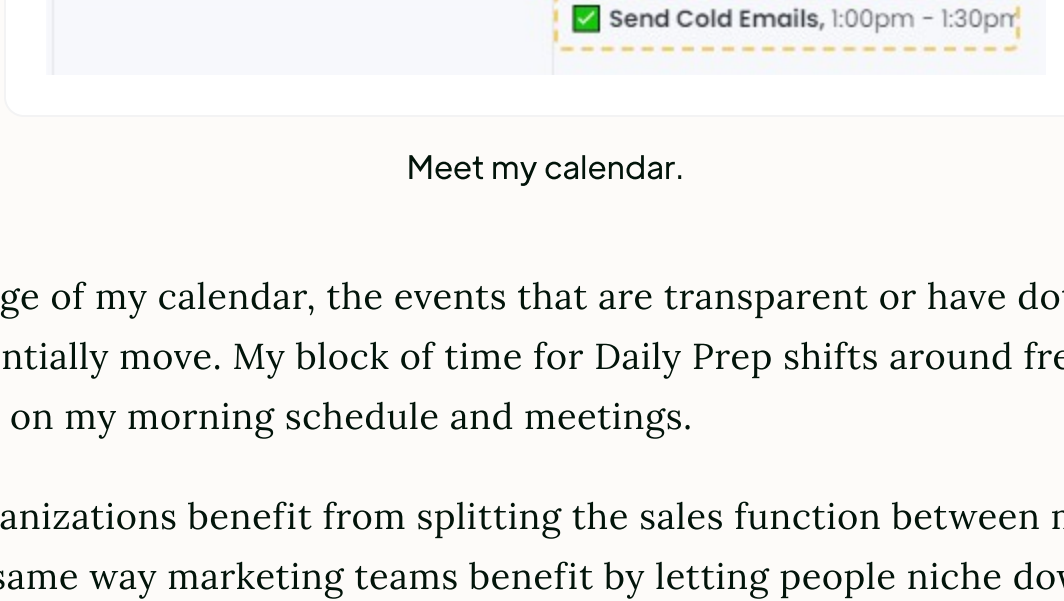
I'd heard of [Reclaim](#) and decided to sign up for a free trial. The product does a few things:

- Blocks off time for a task on my calendar in the next available spot
- Moves blocks of time around for habits like "eat lunch" or "Inbox Zero"
- Protects time on my calendar when I have something due

How does this work in real life?

Let's say I need an hour of time to write a proposal. I'll add the task to Reclaim and indicate that I need to finish it sometime tomorrow before 4:00 pm. Reclaim finds time on my calendar to work on the proposal at 9:00 am tomorrow and blocks off that time.

But if someone looks at my Calendly link, that time will show as available—a meeting could still be booked. If a client or prospect schedules a meeting for 9:00 a.m., Reclaim will move the proposal writing to later in the day. But as internal or external meetings are added to my calendar, then Reclaim will "defend" that event, showing that proposal writing time as "Busy" instead of "Free."



Meet my calendar.

In this image of my calendar, the events that are transparent or have dotted lines could potentially move. My block of time for Daily Prep shifts around frequently, depending on my morning schedule and meetings.

Larger organizations benefit from splitting the sales function between multiple roles, the same way marketing teams benefit by letting people niche down and focus specifically on demand generation, or product marketing, or content.

I'm on my own to juggle everything to keep prospects moving through the pipeline, sometimes with competing priorities. Reclaim helps me balance those needs by moving tasks and projects into the future if something more urgent comes up.

## 2) Invest in a better CRM

It's easy for small companies to put collaborative tools into the "maybe someday" bucket of priorities. After all, departments with only a few people can often make do with homegrown or free options. Why pay for something that isn't necessary?

I'd argue that the opposite is true: small teams (or solo teams) need tools just as much as their larger counterparts. Tools make it easier to get the job done—whether it's simplifying the process, automating redundant tasks, or keeping everything in one place. All of which give a small or solo team more space to do the parts of their job that can't be reduced to a tool.

The tricky part about choosing a tool for a small team is to balance current needs against future demands. Do you select something based on what you need today, or do you plan for a potentially larger team? And if you opt to go with today's needs, how difficult would it be to switch tools in a few years? All things to consider.

Campfire Labs was using a free CRM when I arrived, but it had some limitations. It synced emails, but this was done via a BCC email address, which meant entire threads often disappeared. It couldn't automate follow-up tasks unless we upgraded to an expensive paid plan. Plus, it was clunky and cumbersome to use (making my former product manager self cringe).

The tricky part about choosing a tool for a small team is to balance current needs against future demands.

I'd used [Copper](#) previously at a small B2B company where our business relied on strong relationships, so I figured it made sense for Campfire Labs. And since I'd used the product before, I knew I could configure it quickly so that we could be up and running.

Copper's integration with Gmail is embedded natively, so all communication is synced automatically—anyone can review my emails and know that it's a complete picture. This is especially useful if I'm on vacation and our GM needs to catch up quickly on a conversation with a prospect. Or if our head of marketing wants to see the last time I connected with a client.

I also really wanted a CRM that could automate tasks. As a team of one, some of my regular tasks include following up, checking in, and processing new contracts. I live and breathe by lists telling me what to do each day (a trait that's not limited to work...).

For example, I have automation set up to:

- Remind me to follow up with leads that haven't replied
- Process new contracts that have closed—set up billing information, notify our editorial team, and so on.
- Set a future date to touch base with clients whose contracts are up for renewal

If I weren't using a CRM or some type of tool that automates a task list, I'd be manually creating a list somewhere. Copper ensures that my follow-ups don't slip through the cracks (or, I should say, greatly reduces the risk—I'm still human, after all).

## 3) Automate redundant tasks

Since I'm managing the sales process end-to-end, I'm always on the lookout for ways to improve my own efficiency.

That's where Zapier comes in. I'm a longtime [Zapier](#) user, both professionally and personally. Zapier connects tools in the background and automates redundant or time-consuming tasks. I geek out when I talk about the Zaps I have running in the background. And because I've been using the product for a long time, I know the possibilities.

I've been writing for a long time and, as a result of my career pivot, I've been exposed to a lot of amazing marketers. I've learned about the value of linking to old (but still helpful) content, content refreshes, and cross-promoting on different platforms.

So—for myself—I've built out a Zapier automation based on the RSS feeds of my work on Medium, Substack, and my blog. When I publish a new post, Zapier adds the title, date, URL, and publication location to my Airtable base. Then I categorize each post so I can easily find related content. It keeps my entire library of content organized, without a lot of manual work on my part.

A Name	Published	Public	URL	Topic	Description	CTA
What is a Minimum Viable Product?	6/8/2022	Medium	<a href="https://medium.com/@annaburgessyang/what-is-a-minimum-viable-product-1234567890">https://medium.com/@annaburgessyang/what-is-a-minimum-viable-product-1234567890</a>	Marketing	Test out your content. At the end of the day...	Read My Substack
Look out for yourself!	6/9/2022	Substack	<a href="https://annaburgessyang.substack.com/p/look-out-for-yourself">https://annaburgessyang.substack.com/p/look-out-for-yourself</a>	Work Culture	At the end of the day...	Read Another Post
The Work of Summer	6/11/2022	Blog	<a href="https://annaburgessyang.com/blog/the-work-of-summer">https://annaburgessyang.com/blog/the-work-of-summer</a>	Parenting	No one can predict t...	Read My Substack
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My content library—organized, annotated, and all in one place.

But back to my sales job...

I've created an entire workflow between Copper and Reclaim using Zapier. When I need to write a proposal, I move the opportunity to the next stage in our sales pipeline in Copper. Zapier picks up on that and adds a block of time to my calendar to write the proposal. Then Reclaim does its job moving that calendar event around to the next available spot.

I also have a Zapier automation that sends Slack conversations to my to-do list. If a teammate asks me to check in on a client or follow up on something, I don't want it to get lost in the noise that Slack can sometimes produce. With a quick click, Zapier captures the Slack message and adds it to my to-do list. If I know the request will take some time, I can add it to part of my to-do list that syncs with Reclaim so that the calendar magic will happen.

Could I do these manually? Sure. It wouldn't take a lot of effort to add a block of time to my calendar or retype a Slack request as a to-do item. But as a team of one, saving small amounts of time through multiple automations adds up.

## A final thought on small teams

Even though I'm our only dedicated salesperson, I don't operate in a vacuum. Several people at Campfire Labs collaborate on sales-related activities, including our marketing lead and general manager.

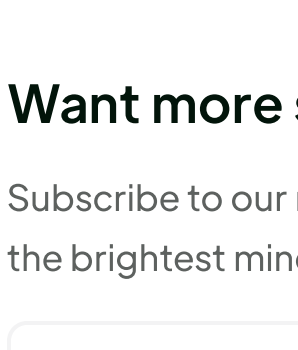
As I thought about building a sales process, I kept the cross-functional needs in mind. We have a CRM that brings consistency and transparency to our sales process. A good process also allows me to take time off, knowing that someone else can step in. Automation will run in the background, and I can follow up on things when I return.

Even though I'm a department of one today, I'm constantly thinking about the future and what the team will look like with two or three. Some of our current process is specific to how I work, but I've tried to select tools that have a lot of flexibility to be tweaked as our needs change.

Now if I could just get around to formally documenting the sales process and everything I've set up, I'm sure our operations manager will be thrilled.

### Anna Burgess Yang

Account Manager



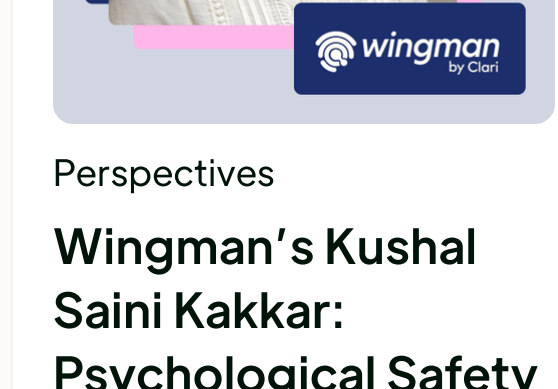
Anna is a productivity geek, remote work advocate, and #5amwritersclub frequent flyer. She spent 15 years in fintech as a product manager before pivoting into the worlds of content marketing and journalism. She also likes naps.

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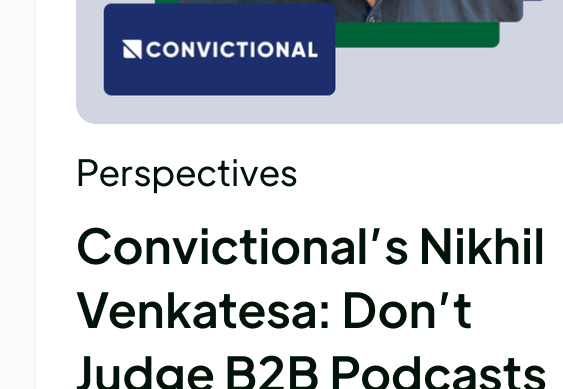
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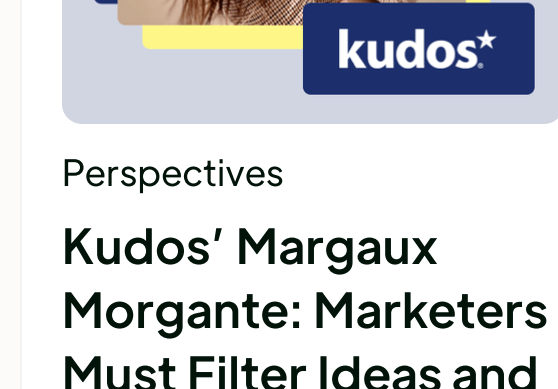
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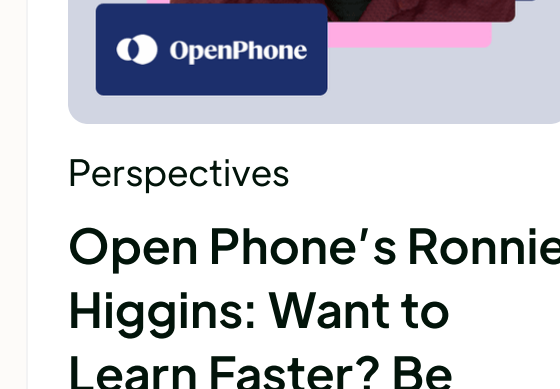
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