

You only need to catch the great wave to be a success

Domain expertise is key.

Find angel investors who appreciate your domain expertise.

Sketchnote Collection #1

Sacha Chua, <http://sachachua.com>, [@sachac](https://twitter.com/sachac)

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Enjoy, and feel free to share them with others!

School is good for social stuff.

account.
Put real money on the line (even a small amount).

You can hedge private investments by looking at similar public stocks.

You only need to catch one great wave to be a success

Domain expertise is key.

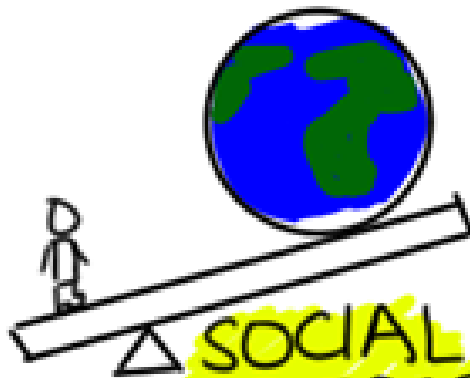
Find angel investors who appreciate your domain expertise.

Twitter Facebook LinkedIn

momentum
SENTIMENT



School is good for social stuff.



Howard Lindzon

Notes by @sachac

Everyone should have a stock market account.

Put real money on the line (even a small amount)

Start with core, then expand. (Think RISK.)

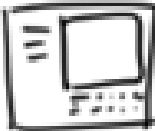


You can hedge private investments by looking at similar public stocks.

500px

Recently funded (with \$ icon) **2 years to get noticed**

Biz model:
- Freemium
- Portfolio templates, analytics, cust.



RR **Personal interaction** is key

TitanFile

Secure file transfer with automated phone verification
RR accountants, lawyers, etc.
Limit: # of files, not MB (not technical)
Right now, admins can access files
Hosted in  Canada



High Score House


Gamification of chores
Cute signup process
Data-driven, extensive testing




Visualize.me

LinkedIn profile to infographic



450+ people
1 keynote
6 demos
lots of fun
Notes by @sachac 


**DemoCamp 29
Toronto
June 9, 2011
#dct29**

Fund market 
Kids love having their own door
Moms on Facebook (Google & FB ads)
Kids like working towards rewards. Choice

2K users in 5 days

\$ interactivity, customization
Dating sites, penpals

LivingAnAwesomeLife.com
AlphaSlides (formerly Mobile Presenter)
Simultaneous slide broadcasts
Mobile & web \$-custom URL, Branding
PDF only for now



Metrics:
of !!! in e-mail ;)
Signup abandonment, return rates, completion, etc.

We are TO Tech
.tumblr.com

Toronto tech profiles inspired by We Are New York Tech
wearetotech.wufoo.com/forms/we-are-to-tech




User testing is key

Best comment:
I hope there won't be a High Score Husband...

RRR laughter

AGING IN YOUR OWN HOME

90% think they can stay in their homes

survey: what to instrument for caregivers?

Medicine cabinet, toilet usage, wake up times, shower/bath usage

people tend to watch their favourite shows - check if missed!

Dementia - calling the same # again

water meters, light switches, contact sensors on fridge

aah.ca/demo
can control stuff, too!

Health & wellness
Also UoF etc.

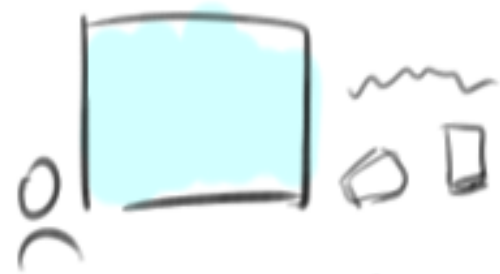


Conversation, mental activity, etc.
Not as invasive as strangers coming into the house

Lots of business opportunities!
Find past startup in Toronto Solcorp

ambient reminders → How do reminders affect skills/behavior?
→ ambient awareness of other people

ERIC BOYD'S QUANTIFIED SELF CONFERENCE REPORT



QSelf conference
digitalcrusader.ca
also Ethan Zuckerbergs notes

also:
vibrams:
25% of audience!


electromyograph shorts!

Devices getting SMALLER!
AWESOMER!
WIRELESSER!

Quantified World



etc.
electromyography
galvanic response


Videos & audio
Promising

Call Looxie



analysis
ex.



 Flourish
→ psych. theory of wellbeing!

 Car Chip Pro, etc.

MONITORING POLLUTION

- smoke detectors & organic detectors
- Arduino-based

Asthmapolis
? mashup?

radiation based
smoke detector

way more sensitive than alarm

Measuring particulates



Retail
differentiator? ←



Next steps:

Networking devices together

Maybe detect pollen, xref w/ asthma

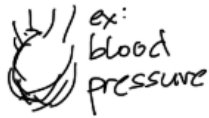
1GB SD card
polls every second

Quantified Self Toronto - October 21, 2011

Brent: App for healthcare



Track biomarkers
Test twice a year and indicate out of expected range



I'm trying to focus on stuff that could kill me.

30-year project
Vitamin D

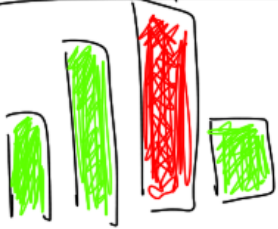
Tasks

	~	~	~	
~	- - -	- - -	- - -	
~	- - -	- - -	- - -	

Tests not all covered by OHIP

Some things not tested in Canada

\$2,500 near Brent's place





53? things important to test

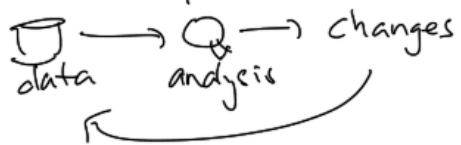
When you give blood, you can get data

Quantified Self Toronto - October 21, 2011

David Phillips, FIS @ University of Toronto

surveillance? 

 tracking, identification
(ex: frequent flyers, etc)
patterns





Surveillance is usually a method for controlling at a distance. ~~RRR~~

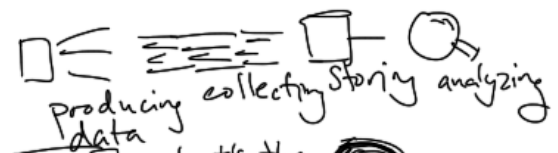
Interested in democratizing surveillance.


Q people playing with cameras

...
Q people engaging with actuarial surveillance

Go check out Quantified Self!

grad student  




Why? what's the GOAL? 



Talked to lots of people at QS conf.

Institutionalization of QS


Hacking individual informal


Market
Zeo, Limeade, Asthmapolis

3 market models being tried:
① Zeo: razor & blades model (EEG tracking) - subscription model

② Limeade: employers (B2B2E) wellness monitoring $\square \rightarrow \square \rightarrow R$
③ Lower insurance costs

③ Asthmapolis
Asthma inhaler that reports location
Hacking was mostly about being better at fitting in (health, etc.)
Sensemaking is a challenge.

Don't get Coopted!

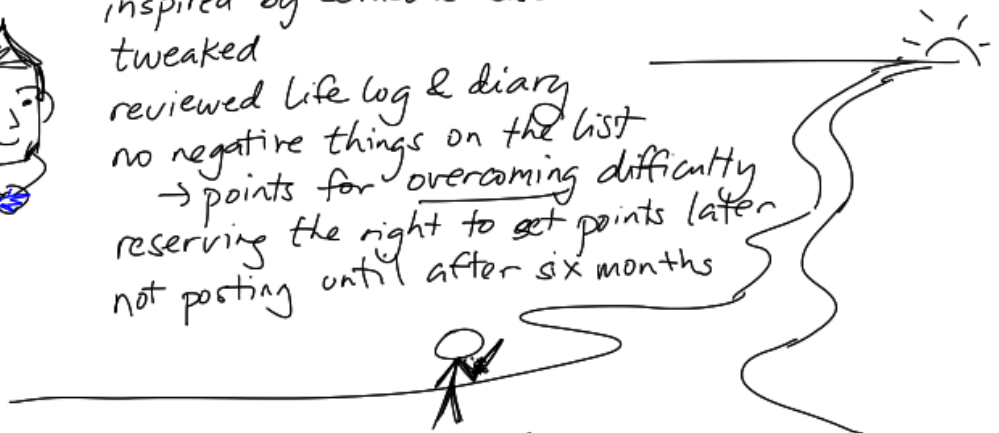
People don't know how to do statistics.


People rarely used the data to populations.

Eric's Epic Quest of Awesome



inspired by someone else
 tweaked
 reviewed life log & diary
 no negative things on the list
 → points for overcoming difficulty
 reserving the right to get points later
 not posting until after six months



idea: social comparisons
 → Try this in my life! also, build into system
 Not set up as a motivating factor, but other people
 might find it handy
 Don't want to end up in a feedback loop
 Want to do a metaanalysis - 

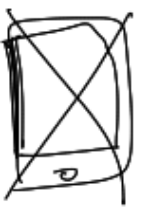
Ideas:

- multiple skills that you can level up in?
 → right now, keeping it simple
 skill tree?
- what's your ultimate goal?
 Review, plan
- ★ Level up parties
- Skill tree can highlight balance issues

Mark

Invents a device to track your time
Sold a few, also rent them out

Corporate time studies - 2 weeks
\$200K sometimes + analysis



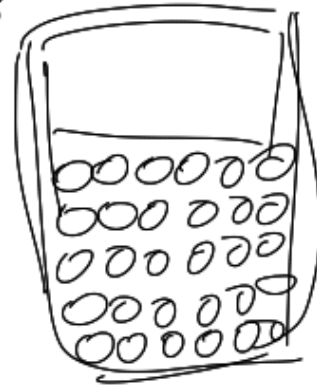
Better than an app? → Portability
Feedback

94% success rate
Not one-on-one studies

No one-person studies

Budgeting time

Tactile, audio



Tracking time,
contacts, cashflow

How do I market it?

Interested in going into one-on-one?
Tracking steps \$1,000-2,000

Q: How did companies change?
example: e-mail
→ miscellaneous e-mail

1800 different activities
(will track his time too.)

tracking higher priority
They have one with secondary input
Something about the physicality
attracts people

Wasted time → ? paper

Mark Ellwood

Rehabit.me - Michael & Jane

Let your friends bet against you or for you
for charity

Team pressure

Secret rewards - so if you fail,
you'll never know! ← clever



Text message

Habit market → templates

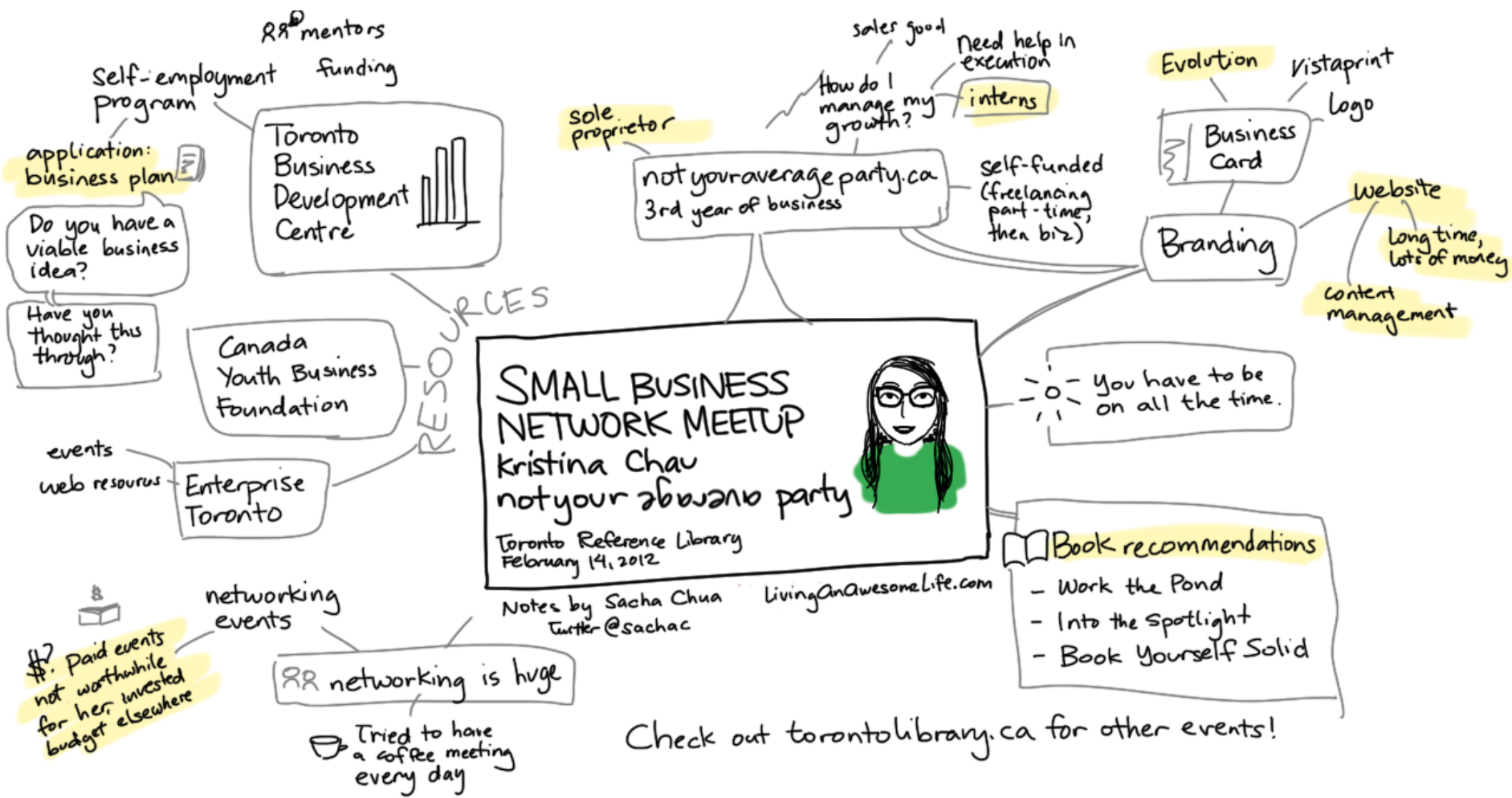
Auditing? FitBit etc.

anticharities

pledges returned

first trial 21 days, will give up

experiment w/
motivators



6 Secrets to Startup Success

John Bradberry
2011, AMACOM

Notes by: Sacha Chua
LivingAnAwesomeLife.com
Twitter: @sachac



The Passion Trap



Founder misalignment vs. Founder readiness

No founder is a perfect fit for his or her chosen startup.

p54

Clarify your reasons, take stock of your resources, and purify your passions. (Make sure you're focusing on the right things!)

Missing the market vs. The pull of the market



p85

Focus on people, not products.
Emphasize markets. Know your market, then execute on the opportunity.

Rose-colored planning vs. Your math story

Planning: Know your critical question! P106



Do we have a concept that anyone (other than us) cares about?

Can we actually make money at this? How?

Is this business scalable? How can we create significant value over time?

See also: bottom-up planning with your sales funnel in mind (p31)

An unforgiving strategy vs. Startup agility

Rapid, healthy iterations at multiple levels

features products/services systems/processes strategy business model identity

Wise founders view learning as the primary objective of their startup launch.

p135

The Reality Distortion Field vs. Integrity

Encourage TRUTH-TELLING and DEBATE



Curiosity + Humility + Candor + Scrutiny

An evaporating runway vs. Staying power

Venture

- RRR Launch close to customers!
- Face your biggest risks early.
- Raise more money than you think you need.
- Commit wisely.

- Founder R
- Feed your fire
 - Focus on achievable goals
 - Balance performance with recovery.
 - Persevere without attaching.

Quantified Self Toronto #10 - March 1, 2012

#QSxTO

bismo.voeb.ca/todoapp/doc/design-boot/index.html

Ben

~~~~~ #work

~~~~~ #...

HTML5 for offline storage
NodeJS for asynchronous updates
Everything in client-side JS
except statistics, complex calc

Goal: Build crossplatform to-do with a single codebase



GTD + Tags & points system

Building for myself Wireframe right now, not yet built

Many todo sites, not quite right fit
also check out

asana.com - group collaboration

Habits: snooze, missed

Urgent for two weeks?
→ Remind
→ Change priority

Quantified Self Toronto #10 - March 1, 2012

#QSxTO

Eric Boyd: BMI mortality update

Process:
Eating more
+
Working out
2x a week



Not just overeating:
need healthy weight



Milkshakes are a great
calorie-dense way to
gain weight.

RESULTS
SO FAR

↑
flu
40-50% stronger on
baseline exercises too

152] 19 pounds of the
30 target pounds

and finding it easier
to recover from
sickness, yay!

Quantified Self Toronto #10 - March 1, 2012

#QSxTO

Michael Schwanzer - rehabit.me



Fail: do something embarrassing

Bet you can change your habits!



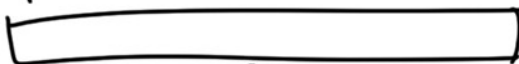
Win: your friends donate to charity



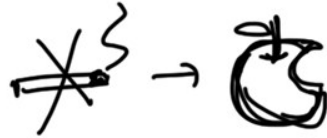
Data automatically collected for easier tracking (RunKeeper, Foursquare..)

Habit you want to quit

Habit you want to start



Balance!



Recommended for changing triggered habits: replace, don't just quit



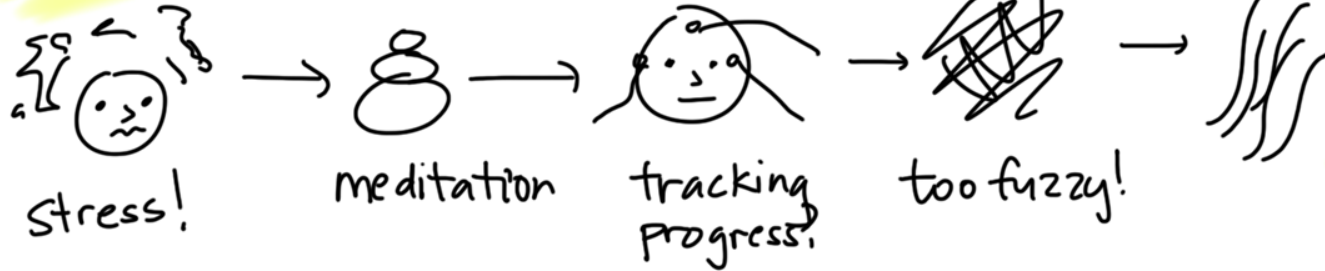
or someone else verifies that you did it

\$ monetization: Lifestyle brands supporting this?

Quantified Self Toronto #10 - March 1, 2012

#QSxTO
BetaBarrel.com

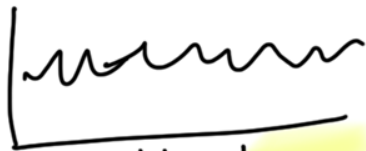
Tate



Started tracking cortisol instead in hair

Not for tracking newbies!

cortisol levels fluctuate over time



Sampling hair: smoother, long-term effects

Service:



Week-level analysis of cortisol

#

no interpretation, just cortisol levels, maybe distributions in the future

cortisol concentration over time

Not a diagnostic tool, mainly for personal analysis

variation even within hairs from one person's head at the same time?

Trial: 200 people
1/2" from scalp, monthly samples

Dyed hair okay

\$15-\$19/mo, 4 data points, thin margins...

Related: Interaxon?

THE START-UP OF YOU

Notes by Sacha Chua, @sachac, livinganawesomelife.com 2012

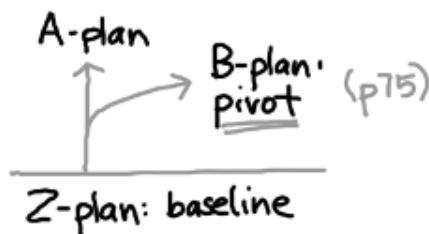


COMPETITIVE ADVANTAGE



Adopt the permanent beta mindset! (p22)

ABZ PLANNING



PROFESSIONAL NETWORK

Focus on helping others.



Create an "interesting people" fund. (p.139)

OPPORTUNITIES



INTELLIGENT RISK

Pursue opportunities that have lower risk than your peers think, but which are still high-reward. (p183)



Regular volatility makes surprises survivable. (p189)



NETWORK INTELLIGENCE

- Private observations (p199)
- Personalized advice
- Filtered information
- Better thoughts in dialogue
- Better questions: (p208)
- Converse, don't interrogate.
- Adjust the lens
- Frame and prime
- Follow up and probe

HOW TO READ A BOOK

MORTIMER J. ADLER & CHARLES VAN DOREN



INSPECTIONAL READING

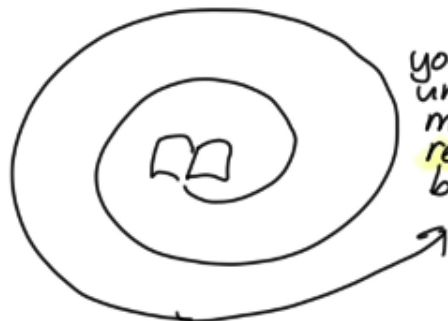
systematic skimming

Does the book deserve careful reading?

Q Title, table of contents, index, blurb, key chapters, skimmed pages

Superficial reading:

In tackling a book for the first time, read it through without ever stopping to look up or ponder the things you do not understand right away.

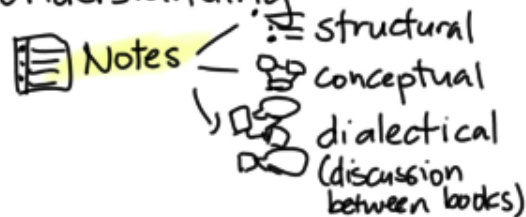


you will understand more as you reread the book.

Read at the speed appropriate for the book.

ANALYTICAL READING

understanding



1. Classify the book.

2. Summarize the book in one sentence or a short paragraph.

3. Show the book's organization/structure.

might not be the same as chapter structures!

4. Define the problem the author tries to solve.

Understand:

Aa I
Terms Message

Is it true?
So what?

Sentences arguments
Propositions

SYNOPTICAL READING

many books & their relationships



1. Find the relevant passages (relevant to you) ← important? ← not important

2. Reconcile authors' terms.

3. Clarify the key questions in the discussion between books.

4. Define the issues.

5. Analyze the discussion.

Lots of tips on how to read different types of material. (Including philosophy!)

Exercises for different levels of reading!



The Publishing Side of Wordpress

Andy McIlwain

March 10, 2012 #wpto (22 people)

Notes: Sacha Chua, @sachac, LivingAnAwesomeLife.com



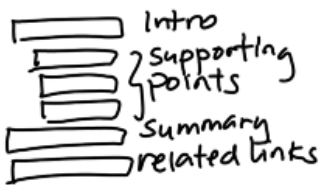
BRAINSTORMING

1. Capture ideas wherever they come to you.






 Evernote: awesome

2. Think about headlines & sub-headlines.



 Always include an image in your posts - 75% ↑ chance of reading on wordpress.com

3. Write focused posts.



Handy post formats:  Lists  Reviews  Guides



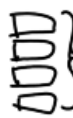

SCHEDULING

1. Build routines



Predictability > Frequency

 Build writing into your routines +  Encourage your readers to make your blog part of their routines

2. Experiment with your schedule

 Write a batch of posts  write the day/night before & schedule


3. Use calendars


 Block off time to write  Give yourself dead-lives



POSTING & SYNDICATION

1. Write.

 Wordpress blog editor

or  Windows Live Writer, MS Office Scribefire, Evernote, etc.





2. Syndicate.

ping.fm can auto-update

3. Monitor feedback

 Dashboards  Google alerts

More resources

-  Content Rules
 -  Copyblogger
 -  plinky.com
 -  wpcandy.com
- #wpto



CAREER TALK @ iSchool.To

UNIVERSITY OF TORONTO · FACULTY OF INFORMATION
 NOTES BY Sacha Chua @sachac LivingAnAwesomeLife.com

The questions from the iSchool students were generally about one of three things:

HOW TO GET READY

Work experience is great!

Even if you don't have it, you can gain experience on projects.

Find your passion and live an interesting life.

Best way to learn?
 [?] work on projects. [?]

Technical skills are good, but it's okay if you don't have them. Work on having great communication skills.

[≡] Take notes & share what you're learning.

HOW TO GET STARTED

Job titles? Fuzzy. Some keywords to explore:

- Information architect
- Community manager
- Analytics/Business intelligence
- Business Analyst
- Social business/Collaboration

3-5 years of experience?

Job ads often lie. If you're passionate and a good learner, people might hire you anyway.

Stepping-stone job?

Beware the job that you aren't passionate about.

Resume? Way less important than networking

HOW TO GET BETTER

Some professional networks, not many.

Advantages of big companies: Internal networks. Mentoring.

Career planning can be difficult.

Learning through projects

Be the customer advocate. Stick up for what's right.

Different companies have different systems, cultures, challenges.

Focus on a clear conceptual understanding of information →

★ what questions to ask? ★

GOOD LUCK & HAVE FUN!

SMALL BUSINESS NETWORKING EVENT @ TORONTO REFERENCE LIBRARY

Notes by Sacha Chua @sachac LivingAnAwesomeLife.com

fetching.ca



Sal Sloan
Fetching!

Exercise classes for you and your pets
2.5 years

Tired of doing something I didn't enjoy.



Didn't have an idea...



until she got her dog!

Just focusing on the next step

So many people will have ideas!

Focus on what you want to do



Who am I targeting?

What makes them tick?

How do I want to help?

People are relentless. Put rules in place.
Ex: Refund policy

Hire good people, give them loose structure

Believe in yourself. You have a real business.

Discounting didn't make sense for my business. ~~✗~~
→ They're not coming back
want people who are less price-sensitive

Media was very receptive.

- No traditional advertising

- Social media

- PR

1. Concept

2. Test

Realistic?

- Craigslist, etc.

You don't have to figure everything out. You'll learn a million things.

Don't be afraid to CHANGE...

Haven't get quit day job - very flexible!
Consulting - covers what I need without pressure

Finding new customers: Retention - so much easier to keep a customer, upselling...

New: Grass roots tactics
Teenagers → postcards at parks

Press, word of mouth

Book: Payment

Focus on what you do BEST

(What do I want to do the best?)

(What can other people do better?)

1st year immersed, then letting go

Craigslist okay for finding trainers

Check: Are you still happy?

Startup: Parents lent \$10,000. Low cost business growing organically

Choose outlets

Prepare a clear pitch → video link (Vimeo, YouTube)

1/3 self-promotion + 2/3 others

Place: Church halls, parks

Knowledge-based marketing

want to expand } Pivot: active fun with your dog
Grew too fast

HAPPY MONTHSARY!



This week, I celebrated the first-month anniversary of my very own business!

MILESTONES



- Left IBM!
- Incorporated!
- Met mentors!
- Set up records!
- Found a client!
- Worked!
- Invoiced & got paid!

WHAT I LIKED



Ramping up quickly and creating a lot of client value



Experimenting and building skills

WHAT'S NEXT



Save the income from consulting



Build assets and skills

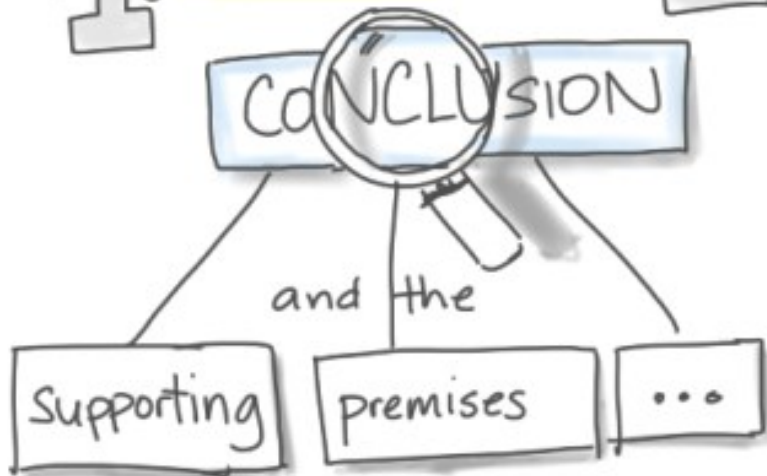
Imagining Wild Success in Visual Note-taking



CRITICAL INQUIRY: THE PROCESS OF ARGUMENT

MICHAEL BOYLAN 2009
Notes: SachaChua.com

1. IDENTIFY the



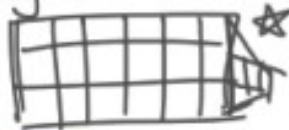
2. ORGANIZE them

- In a
- LOGICAL
- outline
- (This may not
- be the same
- as the author's
- organization)

3. DEVELOP arguments

for or against
arguments that
can be objected
to



arguments so
that you work
with the 
strongest case.

You need to understand before
you can argue.

VISUAL METAPHORS

ARGUMENT

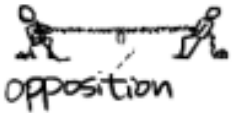
Many people think of this as "fight," but it's a lot more useful when you think of it in other ways!

Notes: SachaChua.com
March 2012

WAR



conflict



opposition



Fight, knock-out, 1-2 punch



Demolishing a flimsy argument



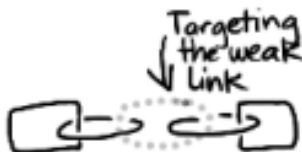
Selling

| US | THEM |
|----|------|
| 1 | ① |

Score



Scoring points



Targeting the weak link

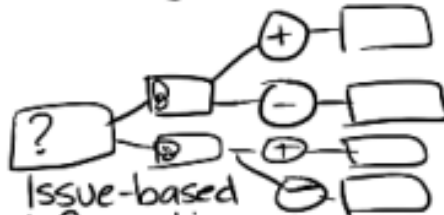


poking holes

LOGIC



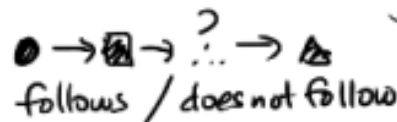
Building an argument



Issue-based information system (IBIS)



Unsound/rickety



(see also: Balance)

COOPERATION



Co-adventurers searching for a creative solution



On the same side



Trading



Shared journey



enough

a collection of essays by Patrick Rhone, 2012

You need to find your own centre of balance, and you will always need help.

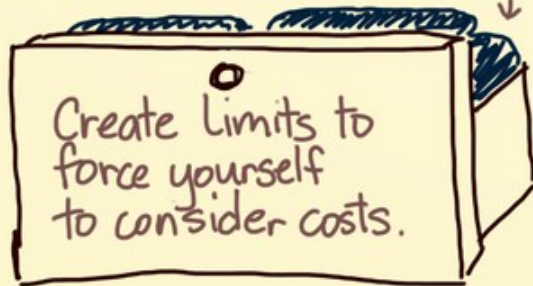


Choose your tools carefully.
Plan your purpose.



NO should be your default answer so that you can say **YES** to what matters

ex: all jeans in one drawer



Change your behavior by swapping something you want to do more of with something you want to do less of.



... and other life tips

Notes: SachaChua.com
March 21, 2012 @sachac

Thank You for Arguing: What Aristotle, Lincoln and Homer Simpson Can Teach Us about the Art of Persuasion

JAY HEINRICHS 2007

We are surrounded by



Learn the difference between



Use the right tense:

PAST
Blaming
"You did it!"
"Did not!"
"Did too!"

PRESENT
Stereotyping
"You always..."
"You never..."

FUTURE
Moving forward
"Next time, can we..."
★

Types of argument (can combine!)



Show that you are similar & have shared values

Sense/medium



Use strategic reluctance ("I normally hate speaking, but...")



Make your option the reasonable middle



$a \rightarrow b \rightarrow c$
Logos
(logic, reasoning)

"is" Control the definitions of terms



You can guide people's emotions by overreacting on their behalf.



"That must have been awful!"



DEFENCE

The book has many tips on how to detect and deal with persuasion.

... and tips for being witty, too!



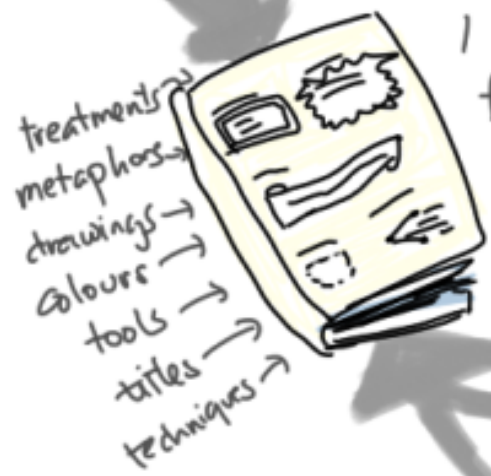
DRAWING | Here's how I'm learning! Hope it helps you too.

BETTER AT

GETTING



I look at other people's drawings for inspiration.



I copy my favourite techniques into a digital notebook



I draw or build a library of elements that I can trace or paste in.



I learn more about my tools and invest in better ones.



I experiment with different styles and techniques

GETTING TO YES:

NEGOTIATING AGREEMENT WITHOUT GIVING IN



ROGER FISHER
WILLIAM URY
BRUCE PATTON

Notes: SachaChua.com



Don't get locked into negotiating POSITIONS



Focus on understanding your interests and other parties' interests.

and come up with a CREATIVE solution.



COMPONENTS:

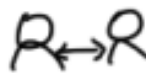
PEOPLE



Instead of seeing it as a conflict,



focus on cooperation



and build relationships.

INTERESTS



Study positions for clues

what people truly value → interests

OPTIONS



If you don't fully commit to one option, you have more creative room.

CRITERIA



Find and agree on Objective criteria, and use reason & logic.

OTHER TIPS

Power imbalance?



Know your best alternative to a negotiated agreement (BATNA)

People who won't negotiate?



Focus on interests

or

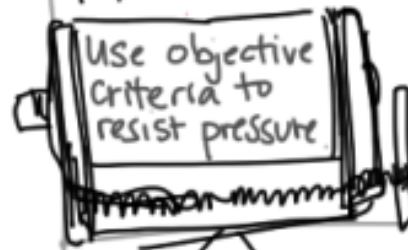
use a mediator



Dirty tricks?



Call attention to their tactics



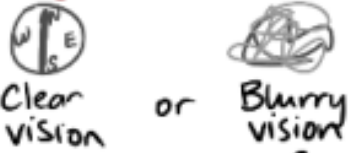
Don't be afraid to take a break or walk away.



WILLIAM MOUGAYAR @ Third Tuesday Toronto

@wmougayar @engagio

See also Paul Graham's chart Stages of a Startup



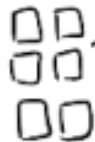
more realistic

When Christopher Columbus set sail, he didn't Google America.



Social capital

Got to know people through blogs



I've made 3,000 comments on Fred Wilson's blog

Got asked to moderate Fred Wilson's blog

8 weeks to a minimum viable product

Demo of Engagio

Notes: SachaChua.com
Twitter: @sachac

5 LESSONS

① Be wary of selling enterprise software.

Very difficult to sell to a large company when you're a startup

② Have an original (but simple) idea



③ Don't believe your own hype

④ Relationships don't matter. Trusted relationships matter.



⑤ Don't quit trying

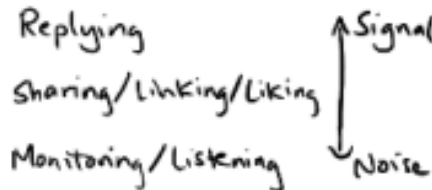


Fragmentation of the social web

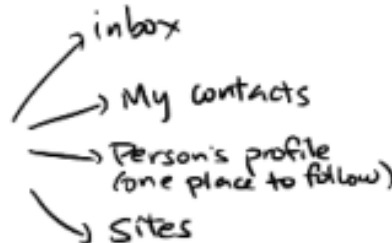
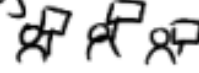


Value in the conversations

Betabest story about startups & alcohol



Online advocacy is on the rise



Neat, would like to try this out

William Mougayar

?? Q&A ??

Platform? Rails, MySQL, Solr, Twitter-Bootstrap

Multiple users? Next week

Yelp? Maybe if API

Equentia? Some ideas for discovery. Get to 100K users first.

How did you get away with looking like Gmail? Haven't gotten a call from Google yet.

Business? Focusing on end-users.

Funding -> priorities for spending?

Engineering & marketing. product development users Building more social features into the product.

Summarizing comments? Maybe talk offline after.

Pivot reactions? Excited. Still had other clients, but could move on.

Personal profile? Automatically populated, can be edited.

Profile resolution? Merging profiles with authentication

Mobile app? HTML5 Track other sites? In road map, may have to create plugin.

Business model? Get to 100K users first. Also, business intelligence/analytics.



Balance

which is actually a bunch of different concepts: balancing, finding a static or dynamic balance, comparing things...

Notes: SachaChua.com - March 29, 2012

The **balance scale** is a classic way to show balance or comparison, even though hardly anyone uses one for actually balancing things.



However, when you start comparing things the visual metaphor gets complicated.



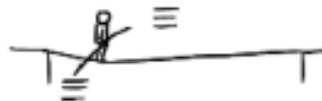
Which one is "better"?
More = better → the heavier one?
Higher = better → the one above the other?



See-saws are like that too, although they're more familiar.



A **tug of war** shows the dynamics between two opposites, and you can highlight who's winning or show a tie.



A **tightrope walker** shows a different idea - balancing between two extremes, striving to be in the middle.

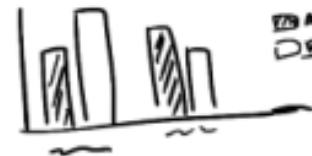
And there's always the **side-by-side comparison**...

| A | B |
|---|---|
| ≡ | ≡ |
| ≡ | ≡ |
| ≡ | ≡ |
| ✓ | |

or a **feature list**...

| | A | B |
|---|---|---|
| ≡ | ✓ | |
| ≡ | | ✓ |
| ≡ | ✓ | |
| ≡ | ✓ | |

... or **charts**...



arm-wrestling is another way to show that opposition.

It's much more about balance than comparison.

Balance Comparison

also another way to show that!



this too

Balancing more:



Force diagrams?



Radar charts?

... so many options!

And that's just for **TWO** items!

How do you show **BALANCE** and **COMPARISON**?

Share! Reach me at
SachaChua.com
@sachac

the shy entrepreneur

Sacha Chua

@sachac

LivingAnAwesomeLife.com



TORONTO REFERENCE LIBRARY
SMALL BUSINESS NETWORK
APRIL 10, 2012



shy & introverted

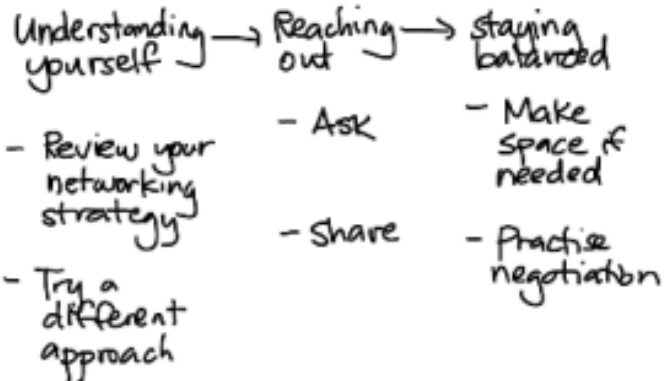
I feel somewhat socially anxious

Social interaction can be draining

But business is less scary than I thought it would be!

Next steps

Where are you and what do you need to work on?



Here's what I've been learning...

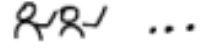
① Figure out what works for you.



Work on your own?



Partner with others?



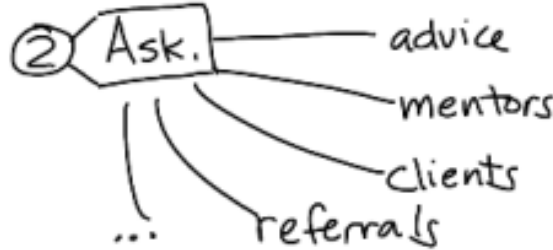
Work alone, but around others?

attend meetups?

go to - or give - presentations?



connect online?



People are often happy to help.

(Practise & this becomes easier!)

③ Don't be afraid to say no.

requests clients advice ...

creatively!

Example:

Yes, for \$X/hour

No, but Y might be a better fit for you.

Learn how to be assertive, not aggressive, or avoidant

Conflict

Push back when needed so that you can make space for what matters.

Tools

April 12, 2012 · Sacha Chua.com

Drawing



Autodesk
Sketchbook Pro

Best pen interface I've used
Great for sketchnotes



Artrage
Studio Pro

Natural media
Tracing
Large images

GIMP

Resizing, touch-ups,
photoshop

Inkscape

Vector drawings

Organization



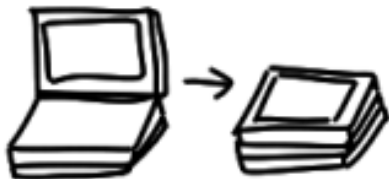
OneNote
Snipping &
organizing
elements



Evernote
Handwriting
recognition!

Hardware

Lenovo X220 Tablet



small
notebook



sketchbook

CHANGE

Notes: SachaChua.com
Apr 13, 2012



Change is a JOURNEY.
Sometimes you have a map.



or a guide,



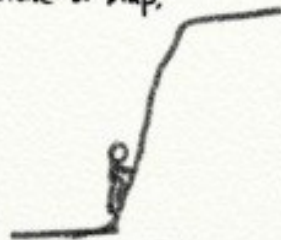
or signposts,



but usually just a long and winding road (if that),



with the occasional fork or crossroad.



change is like scaling a cliff



or climbing the stairs.



You can have fun with the idea, too.



Change is also TRANSFORMATION,



growth,



decline.



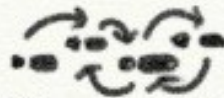
You can pun about change.



Graphs are handy, too.



Spirals show Iteration...



Change can sometimes be like taking three steps forward and two steps back.



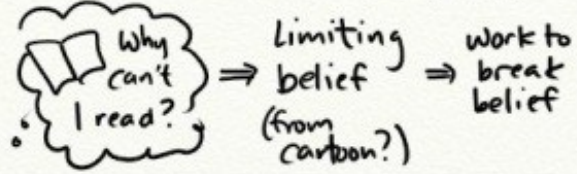
The more things change, the more they stay the same.

QUANTIFIED SELF TORONTO


Nick Lucid Dreaming & Limiting Beliefs

Frequent Lucid dreams  Heard People dream in **Black & White** Really? **White**  **tried it** 
 Noticed dreams weren't in colour!


 So he worked on it until he could dream in colour, and tried other ideas, too!




Lucid dreaming, mental defenses, mind hacking... nifty!


But I'm not disciplined enough to keep a dream log in the morning...
 That's a limiting belief too! \Rightarrow 

Brent  Biomarker tracking with iPad app

 Working on iPad app for logging tracking


?  Looking for an iPad developer who can take over from the previous one

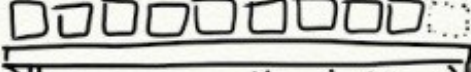
Q&A  Automatic data? Hard - data stream controlled, need certs.


... Making decisions based on biomarkers useful?
 Look at related biomarkers, not just one.

LuiZ 

Calculating storage costs
 Management consultant - used to quantifying in \$
 Measured all their shelving storage & calc. \$/sq ft.

 Is it worth keeping the cereal or just throwing it out and buying more later?

 Space usage threshold before wife pressures him for bigger house: ~90%.

 Buys less stuff now

TRUST

Apr 23, 2012



We show trust by shaking hands,

and by looking people in the eyes,



Open body language: "Trust me."



Closed: "I don't trust you."



Blindfold trust exercises are popular at team-building sessions.



Blind trust is dangerous though.



You could get stabbed in the back.



We don't trust rickety things.



We trust solid ones.



We used to trust institutions. Now, maybe not so much.



Some are more trustworthy than others.



No one trusts a used-car salesman...



3,127%

But for some reason, we trust celebrity endorsements, suits, anything printed, charts, and precise numbers (even wrong ones).



We don't trust poisonous things,



or sits around cheeseburgers.



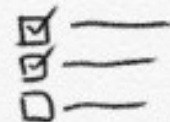
We trust puppy-dog eyes



and babies.

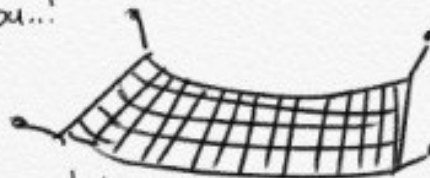


Contracts are usually a good idea, because...



... you should trust but verify.

Trust is like laundry yourself into the air, hoping your partner will catch you...



but you'd better have a safety net too. A good one.

Trust is like a crystal vase that's hard to fix when it's broken.



Like a bone that heals but will never be the same.

DANGER!





Building a Social Enterprise
Andrew Jenkins, Volterra



Historically:



Listen

Competitive intelligence

Q&A Cocktail party conversations we couldn't overhear before

pain points

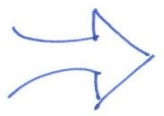
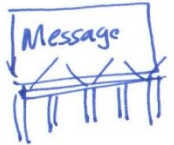
needs



Influence

Some people:
I can't wait for you, so I'm going to set things up myself...

rogues



Engage

Individual targeting



Reputation

Indium example

Content → contact → cash



planking example

Culture

Q&A

Resistors: Use peers, look for the bright spots
It took 20 years for e-mail to be ubiquitous

Who can't gain from greater visibility?
question

Social media: 10 years

RBC: 140 years



External to Internal

Training

Policy - IBM
Coca Cola
Pell



examples

social media university



adoption



How does communication flow?





stories

The Trend →



client wants customized solution



show that you understand their world

1. Trend & historic causes
2. Current situation
3. Thoughts on developments, reasons
4. Recommendations

The How-To

1. —
2. —
3. —

Example: trustees, communication process,

must be:

Relevant + Realistic

not necessarily what you do, but what clients will find helpful

- Process with steps OR
- a list of success factors

1. outcome
2. supplies/equipment
3. steps
4. avoiding pitfalls/problems



The How-to-Work-With

How to get good results from working with you

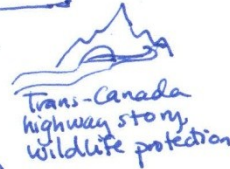


cannot be self-serving & include info on saving money

1. Wild success experience
2. factors
3. advice

The Case Study

Leading-edge thought & sound implementation



Not about showing how clever you are!



Must have learning points THEY can use

Must be a story
Tell with the client → credibility



1. Initial situation
2. Steps
3. Problems & solutions
4. Lessons learned

The Survey →

Shows that you stay in touch must be what your audience cares about

More useful with a trend

Distribute appropriately level of detail
Consider limited distribution

The Opinion



informed opinion, thought leadership → at no charge

Long form

- situation
- views on good & bad aspects
- recommendations

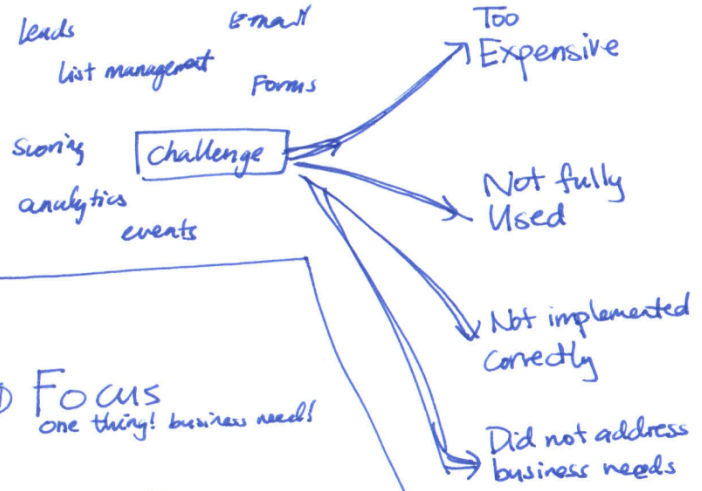
The Review

- New product/service
- what's different
- Discuss good/bad

The Comment

Marketing Automation

Jeffrey Yee, Eloqua



① Focus
one thing! business needs!

② Identify
look for what your top performers are already doing

③ Start small, then build for mass adoption.
→ Target the second-tier salespeople!

④ Wait patiently for the lift.

incremental improvement

Best practices from client side

- Dun & Bradstreet
- Credit risk management
- Sales & marketing
- Supply risk management

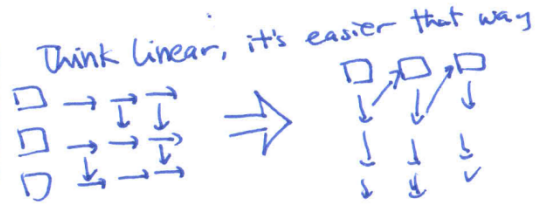


Example:
Retention → trigger-based e-mail
one need
40.1% opens
13.4% clickthrough
10% ↑ in retention rates

② Identify
○ before you automate

Focus group?
Study top performers
How are we achieving this today?

Can we automate and scale this?



Get personal and add value
plain text e-mail from sales, not marketing

③ Mass adoption (but start very small)

advocates get others on board
look for the people who are close to their quotas: Tier 2
→ segmenting your salespeople!
Have reps ret leads before adding to program
3rd party data

④ Wait patiently for the lift. Set expectations.

Bi results:
→ 6 months
pipeline value +19%
of ops -14%
average op size 3%
ops won 25%


Budget 12+ months


like low-hanging fruit
Scaling up what already works

RED ROCKET COFFEE




Small Business Network Meetup
Toronto Reference Library
May 8, 2012
Notes by Sacha Chua, @sacha_c
LivingAnAwesomeLife.com


Make sure you have enough money to live for a year. 

You always have to be "on", even at the grocery store. 


Be adaptable, but watch out for over-adapting. You can't please everybody. 

Book recommendations:
- Setting the table: the transforming power of hospitality in business.
- The little black book of entrepreneurship 

Be prepared to wear a lot of hats. 

Take care of yourself. Give yourself time to recharge. 


Soft opening: work out kinks 

The smartest thing an entrepreneur can do is learn when to let go. 

#1: Good relationships 
clients suppliers neighbours ...

Hire a Lawyer. Any kind of contract, any kind of lease. 

Organization is important! Suppliers etc. make mistakes, bill you twice.. 


Reassess success. 

Had to buy out partner. Have partnership agreement! 

Dedicate time to schmooze. 

Trust your instincts. 

Knowing WHO to ask & WHEN 

We don't micromanage. We're very very careful about hiring, and we let them run the show. We let the store develop its own personality. 

Customers can become suppliers!  Building relationships with people who understand

Build a team you can delegate to. 

Made up recipes  passion!

Self-employment benefits

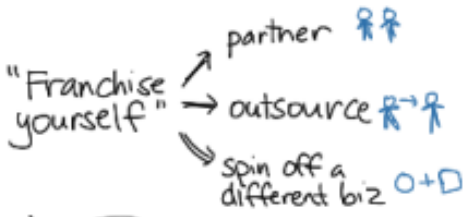


what you love to do
what people will pay for
passion + skill + usefulness = success

😊 benefits > features
Ex: happiness > widgets

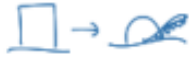


Invest time into growing your business. Learn how to offer, hustle, launch...



Scale up

You don't have to build a huge business. Make one that's the right size for you.



Expand your opportunities by reusing your skills in different areas.



Most people want simplicity. Don't give them unneeded details.

Some businesses are easier to start.



You don't have to be an expert yet!



Action > Planning

Don't wait for perfection. Start and learn along the way.



Where to find opportunities

- marketplace inefficiency
- new tech or opportunity
- changing space
- spin-off or side projects

Decision-making matrix

| | Impact | Effort | Profit | Vision |
|------|--------|--------|--------|--------|
| Idea | | | | |
| Idea | | | | |

Market before manufacturing

Test your idea
Failsafe: offer refunds

FAQ: objection-squasher

254

Make your first sale ASAP. Great confidence builder.

Other useful parts:

- 1-page business plan
- 39-step launch checklist
- 1-page promotion plan
- + web resources

Like this?
Check out my other notes @ LivingAnAwesomeLife.com!

- Sacha Chua
Twitter: @sachac

JEREMIAH OWYANG

THIRD TUESDAY TORONTO • MAY 14, 2012

Sketchnotes: Sacha Chua (@sachac) · LivingAnAwesomeLife.com



X untrained employees

Advanced companies prepare internally first

Jeremiah Owyang

Q&A:

- Analysis? CRM, Omniture (Adobe), SAS, Eloqua... A number of different directions. System integrators.
- Adobe Social. Very bullish, if they can act like a small company. Paid, earned, owned media. Also watch Lithium Technologies & bazaarvoice (300% ROI for ratings). New ad units, IBM social metrics.
- Soc media correlations? Social loyalty (people are loyal to each other), affiliations. C-suite: Novelty, fear, potential for new business models. Any data company stands to gain. Early in the space, lots of experimentation.
- Social software: Cambrian explosion: lots of duplicate companies, VCs investing in clones. Best-in-class will probably cannibalize each other.
- Startup? Yes, but you can go through steps faster. Our research focused on enterprise, but can still help.
- Soc media agencies? ads right now. May need to restructure. Everything starts with learned.
- Disclosure? Vendors unlikely. Agencies making tech-agnostic methodologies.
- Facebook fans? Loose affinity. Facebook wants people to pay. Get clients to tell stories? See banks for example. Office in.
- Product is info? Utility, etc. Go up a level: lifestyle, workstyle. 18% Dandelion, 1-4% Holistic. 1.5 team manager, 1.5 dev manager, 1.5 analyst. Content strategist: emerging role - editorials, ex-journalists, comm agencies...
- Listening centre → some involving business unit centres. triage → good, bad, ugly. FireBell Simulation of social media crisis.

~180 accounts for average enterprise
→ only 25% active

□ □ Social media mostly separate from rest of site/db

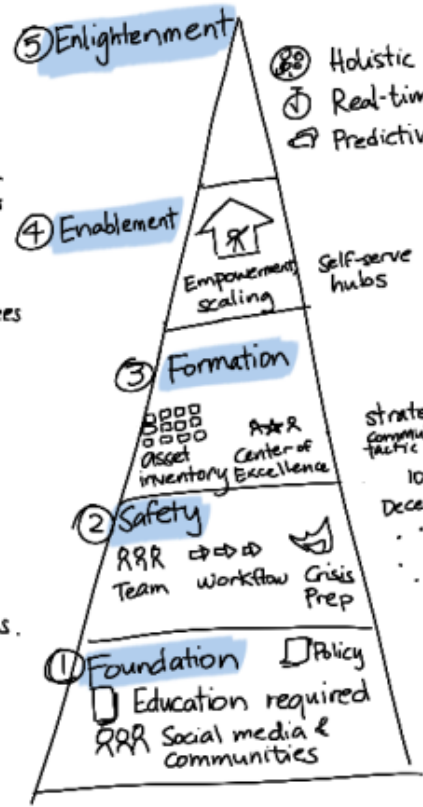
Frequency of social media crises →
- exposure to poor customer experience
- poor influencer relations
- violation of ethical guidelines
- rogue employees

Social sanitation

Reinforcing bad behavior
We're teaching them to yell at their friends.

Constantly getting ahead of themselves.

Advanced companies
Social business hierarchy of needs



⊗ Holistic
⌚ Real-time
⌂ Predictive
Predict what customers are going to do

Integrate into databases, etc.
Build better products
Tap employees

Self-serve hubs
Chatteratti (EZE help, compensation)

bit.ly/altimeterSocial

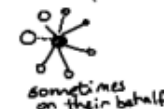
Governance Policy Guidelines Training

strategic internal communications tactic

10.8% Decentralized



41% Hub and spoke

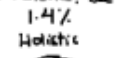
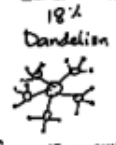


sometimes on their behalf

Education
- Executives
- Strategists/
Business units
- all employees

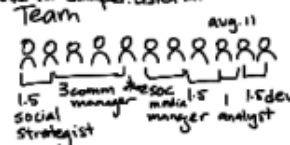
Access
- Tools
- Everyone has access & must be trained

Most crises: Friday afternoon



Safe & consistent (Best Buy, Zappos)

I do customer support CEO



Content strategist: emerging role - editorials, ex-journalists, comm agencies...

Marketing in the Round - Gini Dietrich - July 25, 2012 - #3TYYZ Notes by @sachac

1999
457 companies IPO'd
100 doubled in price

money paid for eyeballs

800 agencies consolidated into WPP



down with freedoms!

But...
Bubble burst!

People stopped working together
... now is the time

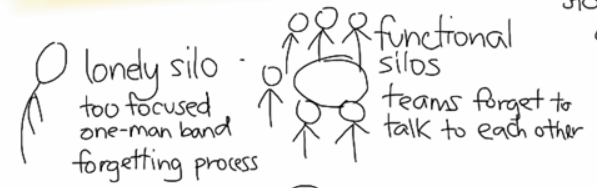
Break down the silos

"Social media expert" overload...

the marketing round

Flatten the organization

two kinds of silos



Changes in routine → fear → anger

culture management
silos - not flexible enough



Book of the Five Rings
Musashi

Flanking example - Chrysler

What would you do if money was not an object?

Map your resources
Reread resumes!

Measure your results.

Story: blog post
4,000 blog post views
2% clicks on paid webinar
↳ e-commerce

- Q: resistance? can be any department
- Q: small business? prioritize
- Q: huge business? we use Skype chat. Find out what works for your culture.
- Q: resistant manager? Get a new job if

- 1 Break down the silos
- 2 Build your marketing round.
- 3 Choose your approaches
- 4 Map your resources
- 5 Measure your results.



Canada's AntiSPAM Legislation (CASL)

Sweeney Williams, Eloqua 

Bill c-28
Not yet implemented

Like CANSPAM

- accurate sender info
- unsubscribe must work
- no-reply prohibited
- liable if you knowingly allow spam on your behalf
- police your affiliates

- Differences
- Explicit consent
 - Not just e-mail!

COMMERCIAL ELECTRONIC MESSAGES!

- Twitter promoted posts?
- Implied consent
 - Existing relationship
 - Prominently published e-mail address

Existing relationships

- Business: 2 years after purchase
- Nonbusiness: donations, membership

NO implied consent for referrals

Implied consent 2 years → get opt-in

Sender must have proof
Business card ≠ consent

Exemptions
personal rel.
quotes if requested
... (look for full list)

Cross-border enforcement

HEAVY PENALTIES
\$1-10 MILLION per message
actual enforcement date unknown maybe 2013
List advertising relationships
Get explicit consent

There will be a spam reporting process.
THE FREEZER

MOBILE WEBSITE DESIGN

Ian Fleming, cactus Design Workshop Feb 2012

Android 68.1%
iOS 16.9%

70% mobile searches
1 hour
Action in 10% of Internet traffic is mobile

RESPONSIVE design web design adjusts to size
CUSTOM design optimized experience good for existing sites less bandwidth use

WordPress templates

Examples
sony.com ibm.com

Approaches



Costs

| | custom | responsive |
|--------|---------------|----------------|
| small | \$500-2000 | \$2000-5000 |
| medium | \$2,000-5,000 | \$5,000-10,000 |
| large | \$5,000+ | \$10,000+ |

- Content management system?
- CMS differences

Best Practices

- Prioritize content
- Fewer images
- Tap, not click
- touch-oriented
- minimize scrolling
- vertical navigation
- page size

Mobile

→ competitive advantage
60% of large companies don't have a mobile site ... yet

TORONTO B2B #8

BrainRider HQ, Toronto, Canada

August 23, 2012

Sketchnotes by Sacha Chua
LivingAnAwesomeLife.com
Twitter: @sachac

Hubwoo preview of site launch

Doing stuff better

Building Programs vs tactics
Scott Armstrong

Program: Integrated tactics

Tactic ex: nurturing plan... but why?
Understanding objectives

webinar → purpose before/during/after multichannels

what is success?
Programs looking for gaps
Qualification criteria

Look for objectives & gaps

marketing & sales compensation hard to trace marketing contribution

Check your existing dashboards cost per prospect audit

triggers for conversion? formats?

Framework

Objective Target Call to Action Offer Activity (channels tactics)
1: Inbound 2: Outbound 3: Network 4: Paid

Make your own playbook


Scoring? out of the box - doesn't work implicit is very tricky explicit is dodgy
60-second eyeball human qualification (LinkedIn, Google, etc.)
Using scoring to improve program numbers + letter grade
inside sales based on not enough volume for predictive analytics in B2B more consumer



Next actions Identify what you're doing, look at programs
Prioritize, plot, fill gaps
Execute
Measure & optimize

PROCESS: READING NONFICTION BOOKS

Aug 28, 2012
Sacha Chua

I hear about books through...


 Toronto Public Library's list of new titles

→  text file
↓
 batch request script

 1. —
2. —
3. —
Other people's lists

 conversations

 blog posts

 references in other books


 browsing in libraries & book stores

So I get them,

 Request library e-book (max 10)


 Request library delivery (max 50, + more with W-)

OR
 Try Kindle Sample
→  purchase if good reference

OR
 Buy physical book
→ especially if I know someone else who will like it

take notes,

→ screenshots or dictation




→  **book darts / dogears** (shame, shame)
↓
dictation or retyping

→ Highlights

→ book darts
↓
dictation or retyping

and process my notes


→ Evernote

Emacs
 archive
 outline
 **schedule review**

need to be more disciplined about next actions

Sharing

Twitter → Blog Post → Email

Search
→ **casual review**
 tag

Sketch note

could flip through most often
→ can sketch more ideas instead of whole books
↑ hard

I spend about **12** hours a month reading nonfiction books (data from the last 6 months)

I skim about 20 books a month.

Aug 29
2012
Sacha
Chua

PROCESS: KEEPING NOTES OF CONVERSATIONS

- Goals:
- Remember interesting things about people
 - Follow up after conversations
 - Connect people with other people, ideas, & tools



Can I take notes quickly enough on my phone?

YES

Evernote

NO

Can I draw quickly enough on my tablet?

YES

Sketch notes

NO

Notebook, paper, or index card

Scanner

Business card

maybe sketch?

Inbox
Tag the meetup's hashtag

Could get better at reviewing, tracking, staying in touch, matching faces.

Blog followup if okay

Follow up on Twitter too

Email

1 day to 1 week after

Look for pictures?

Scheduled reviews?

1 month
1 quarter
...

Flashcards, even?

Blue-sky vision



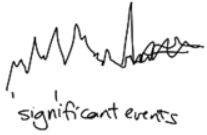
I know who's interested in what, and conversations build on each other instead of blurring. I know many people and can match faces and names.

NANCY DOUGHERTY

Quantified Self is a very **MINDFUL** community

Alex

Withings scale data



biometrics dependent on **emotional state**

The longer I went through the experiment, the less I cared about the data.

Tracking moods
↳ stabilizing them

Mindfulness = awesome

BUT

The world is so noisy!

I wanted to use **TECHNOLOGY** to feed back to me and become more aware

E-mail apnea



EMG sensor senses when I smile



Happy to see you

Observing ourselves with **OPENNESS, CURIOSITY, & ACCEPTANCE**

Q: Do you ever feel bullied by the LEDs?

No... It's really about creating a reason to smile

Q: modeling emotions?



amplifying signal for unconscious brain & other people




QUANTIFIED SELF 2012 OPENING PLENARY

Gary Wolf

Ernesto Ramirez

David Maskin 

Gary Wolf

We'll start & end on time 


> 70 meetups,
> 10,000 members



Must be a personal story

doesn't have to be polished

Show & Tell
- What did you do?
- How did you do it?
- What did you learn?


> 349 videos 

Science hierarchy important... 

... but they can only afford to do so much. 

CITIZEN SCIENCE

Sensors in phone  Sensors in cities 

Are we ready for a billion people collecting data? 

Want to learn about:
What do we need to do to grow GLOBALLY?

practice and mistakes 

Medication, meditation
I'm really interested in habit relapse.



of days skipped 


longest skip 

Conference:

The point is not information transfer, it's thinking.

Quantified self

Computing  → personal 

humans  what do we want to do?
needs → us, we, I, me


There's plenty of room at the BOTTOM

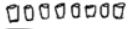
Feynman
Different scale, different challenges

our data & context
data all the way IN

Robin Barooah 

way to make coffee 

Coffee 
4 months to get to a half-shot of coffee, then I was done.

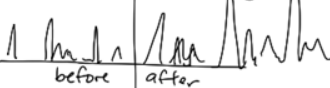
Coffee addict started at 8 years old!
 8-shot venti latte
I was very, very caffeinated.


Then something happened.

I wanted to see what I was like without coffee.

1 month later...


Gosh, I really feel unproductive. I need coffee


Tracking productivity 
before after
productivity did not decline!


Started tracking meditation practice 
IronMan of meditation → don't do it

Depression

Determined not to drink coffee...
... but coffee protects against depression...

started drinking coffee again 

Mourning  October
Distinct change in May
↓ meditation

Losing confidence, self-efficacy 

But there's a seasonal pattern... holidays?

My data turned a bare experience of failure into a slow learning curve to SUCCESS.

QUANTIFIED SELF 2012 · IGNITE TALKS DAY 1

Jason Langheler

Doctors → reactive

Data can be proactive

Default behavior 

Scheduling routines

Social
 — text messages
 — calls
 — e-mails...

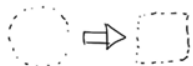
Life map

medical history - dosia

shopping history

→ personalized deals

Use data to set up new defaults



Charles Wang

{ Woman who had suicidal thoughts

↗ Keep longer in psychiatric treatment or release?

What if we had more data?

40% of people with back pain surgery
 ← nothing changed

mindfulness
 posture → Lumoback

learned about slouching & sitting

data → knowledge → action

Dave Marvit, PTSD

 veterans who can't drive

  analysis →  services
 ↑ technician

GPS, stress map

Knowing your stress → helpful

meditation works!


David Fetherstonhaugh

Quantified Us 

Chase Corporate Challenge 

survey on a shirt  sharpies!

Nobody cares that you Quantify

Measurement is a lousy invitation to engage.
  Hawthorne social effect

Daniel Nofal

health info individual → social

wikiLife

open data
 open api
 open source




 other systems

RunKeeper, Nike+, etc.


Joshua Manley

Data-driven health coaching

Formulaic, yay!

But self-exp. is 
 COMPLICATED

unexpected results come from paying attention

You're not alone! 

Greg Schwartz

@uxgreg

BodyMedia armband 

- 3450 cal burned on weekdays
- 3787 cal on weekend day
- 4300 cal intense weekend day
- quietest day @ Burning Man
- ↳ 4433 cal
- ↳ 5063 cal normal day
- ↳ 5764 cal most intense day

Fire dancing: 13 cal/min

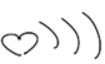
Notes by Sacha Chua (@sachac)

Dr. Alan Greene

Reverse mood tracking

calibrate your SELF to understand people's emotions

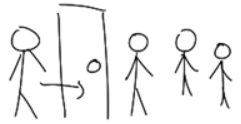
Bad day ... met a boy 

The boy with no eyes felt my SMILE. 

How did he know?

Mirror neurons
→ monkey see, monkey do

Emotional centers



pause: how am I feeling?
pause: how am I feeling now?

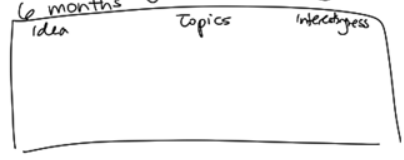
pay attention on the way in
The fastest way to get to the heart of the matter.

Short training period: 2-3 months
people respond to emotional questions
works at home too

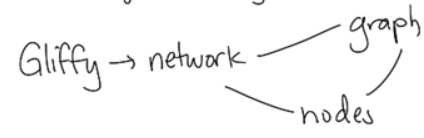
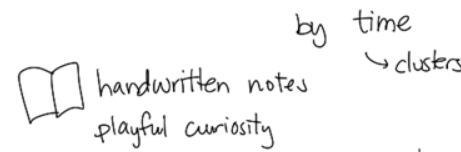
Amy Robinson
Quantified Creativity

What inspires you?

I e-mail myself interesting things



Important entries by topic



Social network analysis
betweenness-centrality

Visualization → context
Understand more about ideas

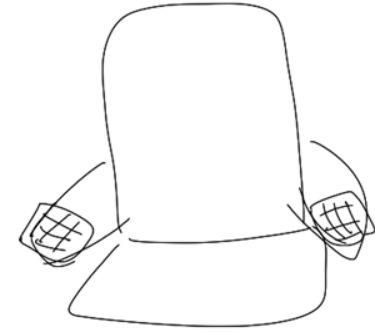
hope to transform the data
? idea granularity
Mark Carranza → idea archive

Mark Leavitt

Quantifying Seat Time

Comfort junkie → heart attack near miss

diet } motivation
exercise }
sitting @ computer → hard



Simple, ambient feedback

LED



- 3 Things I've learned
1. Can't break a habit? Hack it to be better!
 2. Visualizations matter
 3. Own your tools → engaging & motivating

KEVIN KELLY

Quantified Self 2012
Sept 16 - Closing plenary



Quantified Exosenses

- sharable!
- verifiable!
- Malleable!
- Intelligible!

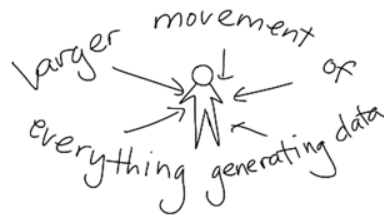
SELF ← a recent invention!

◦ advertising, psychoanalysis



The QUALIFIED self

→ exo-senses



Quantified



If it can be measured or recorded, someone is tracking it.



even toenails!

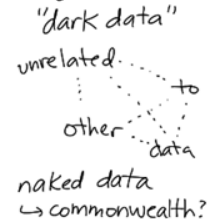
Your cellphone is a great TRACKING DEVICE that you can make calls with.



Are we ready for this scale?



Zillionics



data ≠ new gold
 $8 \square \rightarrow 8 = 8 \square \square$

ownership | access

Nobody owns the ALPHABET.



Data can't be owned → rights, duties
→ commons

The QUANTIFIED CENTURY →



→
The Commons



Extending our selves

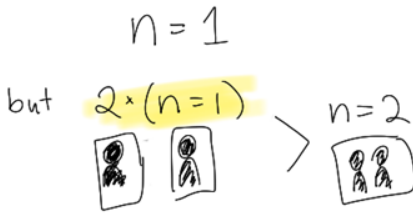


Display is an INTERMEDIATE step.



Senses

The sense of NORTH



NICK WINTER

Intervention schedule
→ on and off, no common factors

11 factors in **3** months

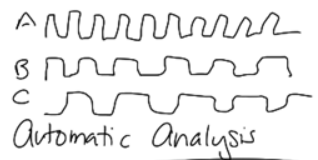
No butter - ~~slow~~ fast
Butter - ~~fast~~ slow

greater effect than mood
Interactions with other factors (paracetamol vs butter)



Experimental design

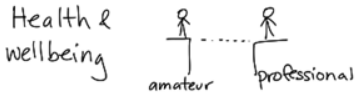
Try lots of things at the same time!



quantified-mind.com

ADRIANA LUKAS

QS: Demand-driven




open & exportable data

Can I export my data? **Data ownership** = value

How can I get more out of my data? Data sets → different formats, no where to share/combine

Need to have data & share data

Aggregate data  but also individual value



DATA LITERACY

Flow of data, not silos


DANIEL ROSENBERG

Timelines


1765 a Chart & Biography

Joseph Priestley  Aggregate patterns in history

Time vs category of achievement

Line graph not invented until 22 years later! Displaying synchronisms 

patterns → progress is real always politicians

 books on how to use timelines?

metaphors well-deployed historical & cultural assumptions

Cyclical history, continuity
Important differences

QUANTIFIED SELF 2012


Opening plenary, day 2

Notes by Sacha Chua (@sachac)

INDHIRA ROJAS

Data visualizations

WhatWePayFor

I feel Fine 

The Whale Hunt 

cowbird

animations

How can we look at time in a **very different way?**

Infoaesthetics, eyeo, daytum

Experiments:
I don't understand it → abstract art right now



2012-09-16

LUNCHTIME IGNITE TALKS. QUANTIFIED SELF 2012 DAY 2

Notes by Sacha Chua (@sachac)
2012-09-16

Hind Hoboeika

butterfleye 

  Heads-up display heart monitor for swimmers

2nd prototype

20 grams  LED
Blue → Green → Red

My mood was directly proportional with the **RELIABILITY** of the device.

Temperature } affected heart rate
Meals }

www.butterfleye.com


Yasmin Lucero

Baby → # of feedings, bottle feedings, longest breastfeeding...

Sleep (relatively constant despite lots of noise)




daytime vs nighttime
Longest nap / longest sleep period


Jan Peter Larsen

automated Activity tracking with smartphone 



Main challenge 

- Burst   
- Adaptive sampling
- Local processing, wifi





Mostly 3-min walk to and from car 
Change in behavior

Natalie McKeever

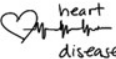
Internal worlds

 pulse 

entrainment
→ breathing, pulse, brain waves, environment

150bpm     arduino
feedback loop Slow heartbeat = relaxing

David Albert

Keeping sick people alive  heart disease

Laboratory experience want to make it mobile

 measuring heart performance

Getting people engaged in their own health

Anne Wright

social, etc sensors, base
Data aggregation → Fluxstream, Bodytrack

open source

Fitbit → dashboard, visualizations, exploration
Zeo →
Twitter → pictures
etc. →

Paul Abramson

Can't trust the system → Hack it yourself!

Headaches ← stress sleep onset?

My Doctor medical group
→ passive tracking devices? people don't use them!
active tracking

Visualizing, telling stories
→ still can't pull it off by themselves

Quant coach → narrative
changing

#ENT101: Finding & Validating Your Idea · Keri Damen, MaRS



> 400 people in person, >200 on webcast

Dennis Whittle:
Why Entrepreneurship Matters



high growth!
4-10% of startups make many more jobs



We want to change the culture to be more entrepreneurial.

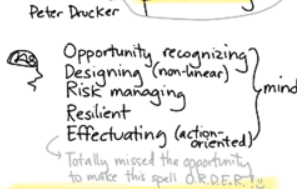


September 26, 2012
Notes by
Sacha Chua (@sachac)
LivingAndAwesomeLife.com

What is ENTREPRENEURSHIP?



The purpose of a business is to find and serve customers profitably.



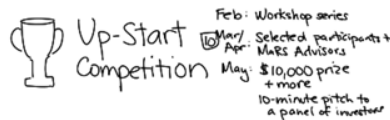
The first challenge: **TAKING ACTION**

The average age of an entrepreneur is **40**
Startup Genome Project

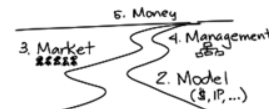


Stages: Mentors help!
Discovery -> Validation -> Efficiency -> Scale

Entrepreneurship 101
focused on tech & social business
(but others are welcome!)



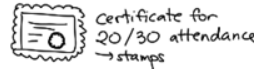
ENT 101



1. The Journey Begins

Maybe 2 and 3 should be the other way around...

People overlook the "people" piece...
↳ building & managing a team



LinkedIn group questions, expectations

UP-START ELIGIBILITY
Participants: ≤ \$100K investment
≥ 20 stamps ≤ \$100K cumulative revenue
Toronto Greater Toronto Area



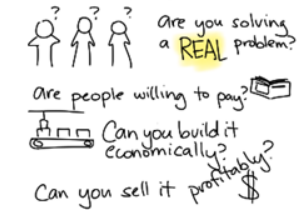
Where Good Ideas Come From
Steven Johnson



FINDING YOUR IDEA



VALIDATING YOUR IDEA



Don't forget to register your stamp cards!

DEVELOPING DIGITAL MARKETING INTO YOUR WORDPRESS

AUSTIN GUNTER
WORDCAMP TORONTO 2012

Sept 29, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

One does not simply add Facebook plugins to Wordpress.



Boromir (not really)

Know your visitors

Awesome audience example: SetOnSurvival
↳ most of audience is from Texas

LESS IS MORE.

Social media strategy

Who is your market?
Where are they?
(ex: Wordpress devs - many on Twitter, fewer FB/pinterest)

Ex: WP.engine Twitter > pinterest
wedding chicks - great pinterest

Call to action



right there!

not hidden in a whole lot of other share buttons



Not about product or company...
Looking at relevant blog posts & sharing them

↳ scheduled tweets

buffer app



Talk as a person

Twitter → 140 character testimonials



social proof

+ favourite tweets, highlight relevant ones

Storify Buffer

Tweet, site is down!

↓
acknowledge, talk about it (email, phone, ticket)

Twitter: not self-promotional! Unfollow/Block is so easy

Wordpress: Fix your open graph tags!

→ Facebook conversion

Facebook comments

→ Post to Facebook



Like comes after the relationship

James O'Hucher → excellent ex. of Facebook



↳ Google+: contributor to

↳ authority

Storify - compile tweets

Twitter:

Curate content, use Buffer-app

Grow your audience before you need it



Never argue with people who tell you that you've messed up (you probably did)



Q: Contests? Yeah, umm...

Austin Gunter

GIVING BACK TO WORDPRESS

MO JANGDA
WORDCAMP TORONTO 2012

Sept 29, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com



Wordpress

↳ GPL: free as in speech

Don't be selfish (even if you can be)

Don't cause infighting



How to Help

1. Use Wordpress

★ Rate plugins, record compatibility

💬 Say thanks, provide feedback

💰 Donate

➔ Share wordpress

Ⓜ Swag

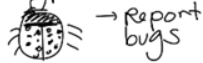
👤 Share tutorials/tips

? Forums, stackExchange...
↳ can lead to freelance work

Share your code

📁 open source

Help break Wordpress

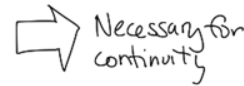
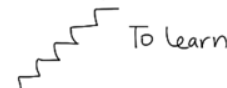


Help make Wordpress

make.wordpress.org

📖 Handbook

Why



You can't spell Wordpress without U.

build.codepoet.com

Q: Certification

When hiring a developer → check their community contributions



Plugin Directory API

→ Dion?

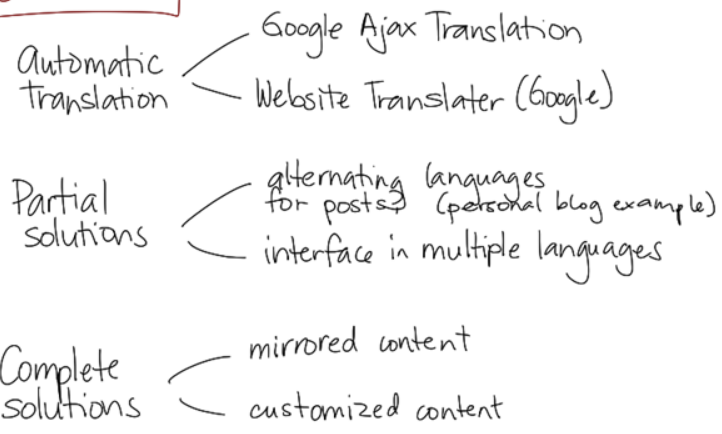
Mo Jangda

OPTIONS FOR A MULTILINGUAL SITE

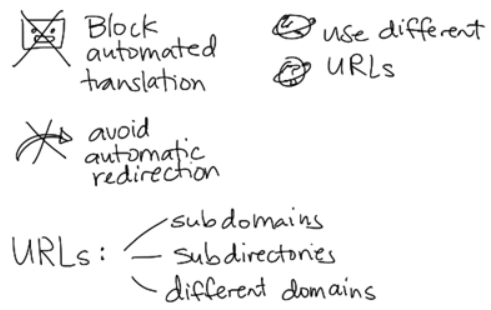
SHANNON SMITH
WORDCAMP TORONTO 2012

Sept 29, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

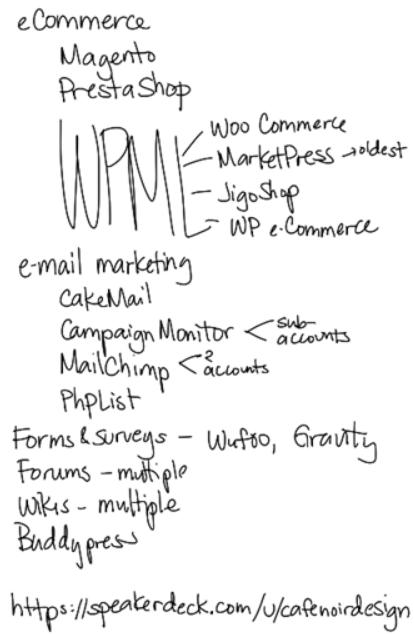
CONTENT



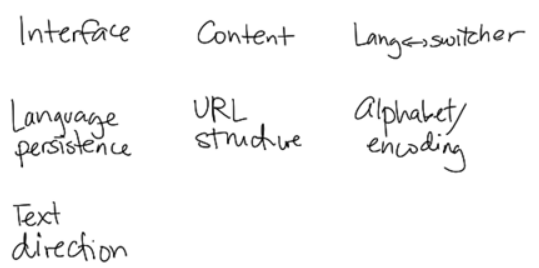
SEARCH-ENGINE OPTIMIZATION



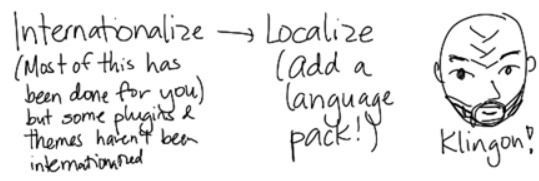
ADVANCED FEATURES



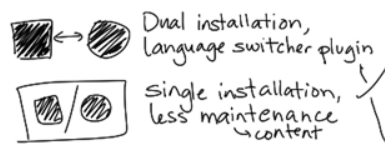
TECHNICAL CONSIDERATIONS



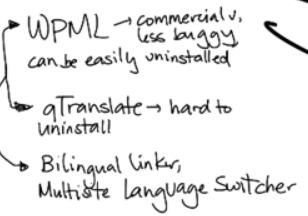
PREPARING FOR MULTILINGUAL



METHODS



PLUGINS



POLITICAL CONSIDERATIONS

Flags can be tough!
Colours
Default splash page & language
→ both languages

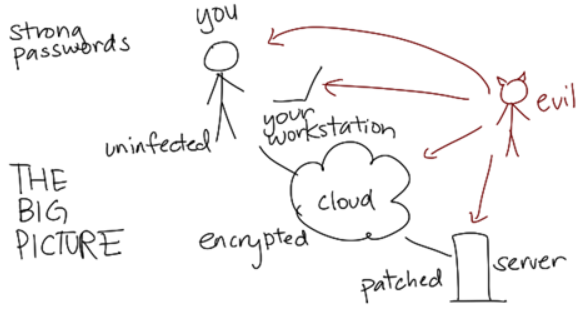
S. Chua



SECURING WORDPRESS VICTOR GRANIC WORDCAMP TORONTO 2012



Sept 29, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com



Attack vectors: Mitigation

Known vulnerability UPDATE!

I wait until the first maintenance version, 3.4.1

Update as soon as possible to new maintenance versions

ChangeDetection.com ← codex wordpress versions

BACKUP

~~Automatic Update~~

→ your web server should not be able to overwrite your files!

(unless you set up FTP/SFTP/SSH)

see tutorial in blog post

Account Infiltration

- Strong passwords
 - ↳ LastPass generated passwords
- Authentication Unique Keys & Salts
- Don't use "admin" user - replace with
 - ↳ admin → ?
 - Hide the admin slug (Edit Author Slug or change in DB)
- Use FORCE_SSL_ADMIN → true
 - ↳ Maybe even mutual authentication

Crap Code

- Delete plugins you're not using
- Use only reputable plugins
 - ★★★★★ - Last updated, # of downloads, rating, support forum
- * Themes
 - (Rec: Theme Hybrid, Suffusion, Genesis, Woocommerce → recently hacked, audited)

Malware (see switchwp blog for code) or see Codex

- Prevent code execution
 - wp-content RedirectMatch 403
 - all php files under wp-content
 - Ditto wp-admin/includes, wp-includes
- Prevent comments if referrer is blank
- Change table prefix instead of wp_

Best practices

- Avoid giving write access to the web server
- Disallow web editing of CSS and PHP!
 - define('DISALLOW_FILE_EDIT', true);
- Don't display errors, but log them.
 - @ini_set('log_errors', 'on');
 - @ini_set('display_errors', 'off');
 - Haha! I've mitigated you!
 - Logs are awesome
- Google Webmaster Tools - red flag for delisting because of spam links & malware
- Other services: VaultPress, Sucuri, Stop the Hacker
- Hide your Wordpress version (optional)

Compromised? Check Wordpress Codex for FAQ

switchwp.com/wordcamp-toronto-2012-presentation-on-steps-to-securing-wordpress/

Victor Granic

WEBMASTER'S TOOLKIT: SEO & WEB ANALYTICS

ANDY MCILWAIN
WORDCAMP TORONTO 2012



Sept 29, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

Search engine optimization

Content isn't King
if no one recognizes the Kingdom.



search engine algorithms:
secret recipe
that keeps changing



Resources:

1. SEOmoz' Beginner's Guide to SEO
2. Google Webmaster Videos
3. SEO News & Community discussion
 - SEO Moz (blog, ygc)
 - Search Engine Watch
 - Search Engine Land
 - Alltop SEO Headlines
 - This Week in Google
 - Webmaster World
 - Digital Point
 - VTN



4. Conducting a Technical SEO Audit
5. Wordpress SEO plugin by Yoast
 - especially for canonical pages & breadcrumbs & XML sitemaps

6. Scribe SEO plugin for Wordpress
 - content marketing recommendations



7. Xenu Link Sleuth & Screaming Frog
 - Looks for broken links

8. Webmaster Tools (Google, Bing)
 - don't forget about Microsoft! Default search engine for many

WEB ANALYTICS



Off-site metrics
Alexa, Nielsen, Klout...

+ Onsite metrics
Google Analytics, ...

Google Analytics ↔ Google Webmaster Tools

Avinash Kaushik's
Digital Marketing
Measurement Model






Free custom reports
for Google Analytics,
too.

User-Testing.com
\$40/test

ChartBeat (real-time)
Optimizely (A/B testing)
CrazyEgg (heatmap)

Summary:

1. Build a toolkit. 
2. Use other people's work as a starting point. 
3. Content is worth nothing if people don't know it exists.
4. Don't obsess over SEO. (Play by their rules.) 
5. Skim headlines/forums
6. Plugins
7. On-site analytics a must.
8. goals

slides will be at 2012.toronto.wordcamp.org

E-COMMERCE & WORDPRESS: JONATHAN DAVIS WORDCAMP TORONTO 2012

NAVIGATING THE MINEFIELD

Sept 29, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

77% of Canadians are online
- eMarketers Feb 2011

e-commerce is hard!

off-site/onsite payments
↓ easy ↗ not so easy

Merchant accounts

Discount rate
→ qualified rate

Lots of fees!

Tips:

- Some merchant accounts have payment gateways, check compatibility
- plan for approval - max Find out about monthly limits
- Find out about reserve amounts - Beware of chargebacks

PCI compliance

- ✓ self-assessment (frequently)
- ✓ questionnaire
- ✓ fixing gaps

Q: (Integration w) POS?

Woo → Quickbooks

Wordpress Security

Change your password like you change toothbrushes.

- Salt your keys
- avoid 'admin' & other defaults
- change table prefix
- Update everything
- Backup everything (3 different places)

Q: Membership & Subscriptions?
Cart 66,
S2member,
Wishlist member

Q: Non-table layouts?
Many now use CSS and DIVs or LIs

E-commerce tools for WP

Themes with e-commerce baked in
↳ a sham → you lose it when you redesign

- WP eCommerce: getshopped.org free + \$ paid addons
- Cart 66 - uses [shortcodes] - starter
- JigoShop - full e-commerce
↳ WooCommerce (fork of JigoShop)
- Shopp (\$55 or \$299, \$25 addons)

Other stuff:
Ready! eCommerce
Easy Digital Downloads
WP eStore
Event Espresso

Jonathan Davis

Off-site payments

No need for SSL or PCI compliance

No need for merchant account

payment gateway

On-site payments

Seamless, easy checkout experience

stripe is now available in Canada!

Also popular: beanstream

Encryption

SSL certificate: \$50-\$1500/year

same technology more trust?

Single domain
multiple domains (VCC)
Wildcard sub-domains
extended validation → very involved process

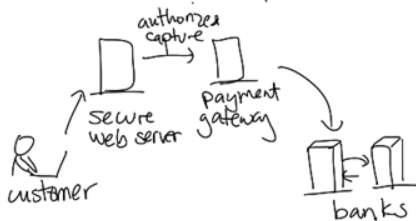
Vendors: Verisign, Komodo, GoDaddy, ...

PCI-DSS: 12 requirements

You are responsible for making sure your service providers are doing their jobs ^{security}

PayPal Standard Express
↳ Paypal
↳ Paypal
↳ complete

Pro Seamless experience



BUILDING YOUR BUSINESS ON WORDPRESS

RICHARD MARTIN
WORDCAMP TORONTO 2012

Sept 30, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

Background:
product marketing
↓
online entrepreneurship

MeloGuide™
→ Healthcare services

People become really unreasonable around patents, trademarks, etc.
We had to get a trademarked name → Health

Continuing education credits → good

People love books.

continuing education professionals
Building Better Bones (15 hours, \$275) videos licensed to US
~ 2 years

Building a Stronger Core
develop content a year to introduced 2 weeks ago

2. Online Client Programs
- video content, assessment, etc.
- Exercise for Better Bones
- Yoga for Better Bones (Amazon)

3. Physiotherapy services
Three revenue streams

FIVE LESSONS LEARNED

1. Understand your client/market
Language, terms
Credibility
Many of our buyers are passionate old-users
Clinic ↔ online
Same profile/demo
DETAILED PROFILE
Ex: 40-65 years of age, university-educated, active, 50% diagnosis
of osteoporosis, frequently have parent of condition, prescribed meds, limited guidance, concerned about effects
⇒ Building profile over time

2. Understand the transaction (what happens before, etc.)
course package in person
assign nominal value
Steps
free → paid
Autoreponder, 5-day video program
Sometimes things take off when you don't expect them to

3. Choose the right platforms
CMS Video
E-mail Social Publishing
Umbraco + Wordpress CMS + Blog
Problems: Domains, Google Analytics, 2 CMSs, control

Things are currently working, don't want to break it.

4. Be efficient
Make it easy for content makers
Reuse
Look at traffic patterns & build

PREMIUM VIDEO
YouTube
→ no private content
Screenstation
→ less robust player
→ Flash, no iPad
Vimeo Pro
some problems
→ udeemy.com

PUBLISHING
Lulu, Amazon
→ value of paperback
EPUB, InDesign

5. monitor, then matador (pivot)
Track your transactions
Mailchimp benchmarks

SEARCH
→ Mayo Clinic hard to beat
→ Description: include offer
Take my free course on...
→ Youtube search

Have you done this before?
Show me where it's worked.

Don't go into paid stuff until you know stuff works.

CHALLENGES

- Takes time to develop content 300-page book
- Not traditional product development process
→ needs to be faster
- Finding a point of entry
Is my category big enough to make money?
↑ ↑ ↑ × \$\$\$

- Navigating through the noise
lots of bad advice
- SEO & search marketing are not enough
- Long-term implications of decisions

You want to work with a company that's going to be around.
(ex: Wordpress, Youtube)

Affiliates:
we don't want to be seen as just a sales engine

WORDPRESS CASE STUDY MALVERN RED & BLACK SOCIETY

SHANTA R. NATHWANI
WORDCAMP TORONTO 2012

Sept 30, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com


After 100th anniversary
reunion → so many people!

THE PROBLEM


Static
Website,
needed programmer
to update

 → \$ some
donations
Newsletter:
8 pages?
paper, email,
PDF


Most of committe
retired → worried
about succession

NEEDS

~~Coding~~


multiple
contributors


photo
albums


forums

Surveys


Scalable


Customizable

POSTS vs PAGES

dynamic
tags
events & news

static
no tags
contact, about

CATEGORIES vs TAGS

structure
menus

describe content
5-7 tags/post

BUDGET

\$20 for domain

\$6.95/month on Bluehost

\$120 BuddyPress backup (personal) → also for moving
Total for org. \$100/year



CUSTOM MENUS → Categories
→ Tags

How are people going to
find this?

Copy
from Word → KitchenSink

WISHLIST

→ Roles & capabilities
→ static welcome message
→ CSS spacing

→ Galleries
→ Dlvr.it
→ Mailchimp
→ Eventbrite

You can do it
yourself.

THE BIGGEST CHANGE:

Member behaviour → they have to post

Launched a month ago
18 months because of dev issues

WORDPRESS OF 1812

DIGITAL DUNCAN WORDCAMP TORONTO 2012

Sept 30, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

Augmented reality
VIDEOS for history

Digital Duncan
150 actors
muskets, etc.

Boy Scouts & Girl Guides



Geocaching + augmented reality
→ 5 codes: Orienteering badge + History badge

Accessibility

Deliverables
- ↑ awareness

Project: 4 months up
→ 3,000 visitors/month


Outreach
Wordpress
Augmented reality posters
Geocaching locations
Presentations
Short videos

↳ mostly from
Search

connected with fb5c.org
↓
sustainable communities

PLUGINS

Breadcrumb navigation XT
○○ ○○ ○○

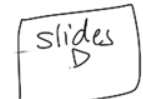
Contact Form 7
 → also volunteers

+ Really Simple Captcha

Sucuri Scanner



uBillboard 3


Premium slider

Google XML Sitemaps

fb5c.org
↳ user's Event Calendar 3

↳ all in One Events is good too.

Wordpress Database Backup

WP Security Scan

CUSTOMIZATIONS

YouTube video links
in the top right
↳ PHP code to resize

ads

Social links
→ preprogrammed graphics



LESSONS LEARNED

→ automatically resize videos

Template to be shared tonight
digitaldeceptions.ca

MARS ENTREPRENEURSHIP 101: LIVED IT LECTURE

BRUCE POON TIP · G ADVENTURES



Goodli

Oct 3, 2012

Notes by Sacha Chua (@sachac)
LivingInAnAwesomelife.com

1990 Backpacking myself...

Envision the world before



People had to go to travel agents



Looking for adventure companies in German phonebooks...



I realized...
Canadians only have ~2 weeks holiday.

How do you turn tourism into something exportable?



All these people trapped in mainstream holidays... → Opportunity!

Now → I'm surprised by the number of people who say

I want to go to Antarctica this Thursday...

\$100 spent
only \$5 actually stays in a developing country's economy. → UNEP 2008

ex: public beaches in Jamaica

Flashback

I just got my fax machine...
... and then I realized they needed to have a fax machine too!

Business model:

☹️ Happiness

Building a business model around this...

1993

Europeans have The Australians work between way more holidays - holidays...
Export the business? → need a brand

Q: How do you do everything?

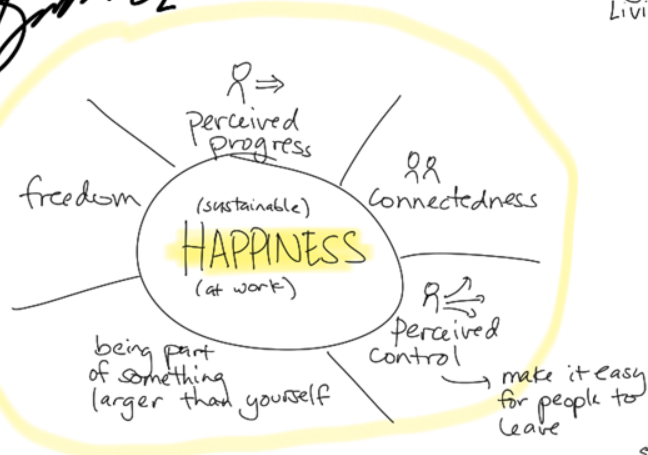
A: Great people

Q: Pivot?

A: The world is changing so much. ~ every 5 years

Q: Biggest mistakes?

A: Trying too hard to find diamonds in the rough while bootstrapping → sometimes not best for business



Example: Peru
weaving
youth going into tourism industry
time

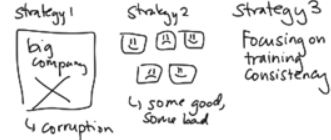
women's weaving co-op
→ help people
→ differentiated our trips

Solving a business problem with sustainable solutions

Netflix - 14 pages of core values!



More advice from Q&A: boutique, niche



Building iconic brands

movements



cheap → premium

My leadership challenge: 1500 people, most of whom I'll never meet. → want them to be happy & deliver

Tourist
Traveller

Taking what we are as a business and turning it into a movement.

Transcending your product. → Engaging your customers → why, stories

Challenging customers: What will you do today for tomorrow?

Engage customers for a higher purpose → beyond travel partnerships, projects
Doesn't have to cost you anything

Now:



a whole new style of business

#torontoB2B

BRAINSTORMING

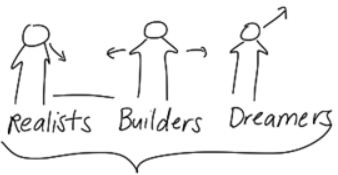
MARILYN BAREFOOT

Oct 4, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com



THERE'S GOT TO BE A BETTER WAY...

10-item personality test
(Think Cosmopolitan meets Myers-Briggs)



Evenly divide into groups

Exercise:

1 Each group gets 2 random pictures, picks 1

For 1 minute, free-associate words.

Then pick a combination of 2-3 words as your team name.

ours: Blue Sun ☀️

2 Two random people in the group share the strangest thing in their bag/purse:



Likewise, brainstorm words related to those items (1 minute each)

3 Each group submits 1 problem/challenge to work on. Everyone uses the words from #2 to brainstorm ideas for the lucky winner.

~5 minutes

Lots of Stimuli



Key take-away:

Generate lots of stimuli before you know what the challenge is, then find ways to relate them.



#torontoB2B marketers meetup

HOW TO CREATE A FREE TRIAL THAT WORKS

Justin Norris
ClearFit 

Goals of a free trial



How do you take people to the point of not needing to look at anything else?

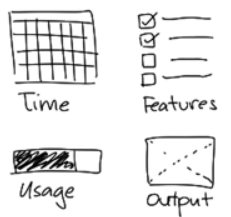
pain of leaving > pain of paying

- | | |
|--|--|
| <input checked="" type="checkbox"/> Pros | Cons <input checked="" type="checkbox"/> |
| Product sells itself | May prolong sales cycle |
| Beachhead | Costs money |
| Captures leads | May not be ideal demo of product value |

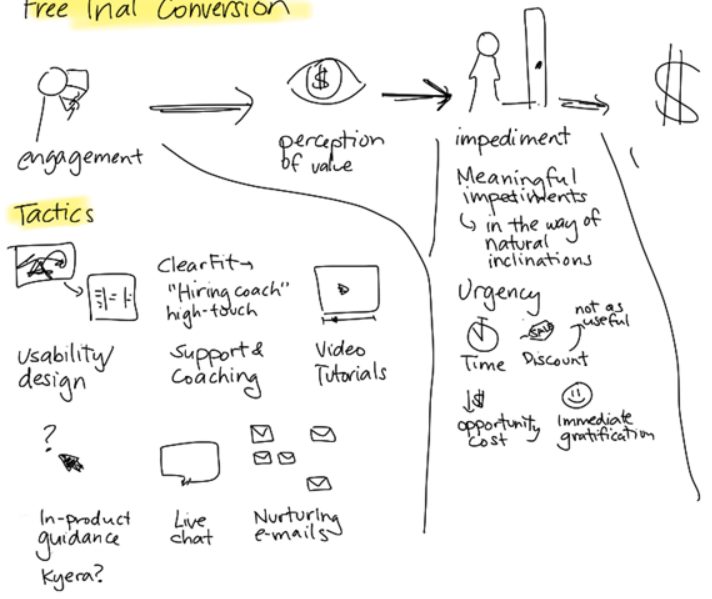
Alternatives




Variables



Free Trial Conversion



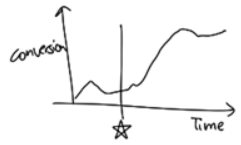
ClearFit free trial case study

- Trial #1: Usage-based subscription trial
- 
- first five: free
- too easy to game, didn't match customer needs, positioning problems
- Trial #2: First 3 → same prob.
- Trial #3: per job pricing 30day free trial
- ↳ too much work for clients, still easy to game
- Trial #4: 7 day, same prob
- Trial #5: all-in-one solution
- ↳ people thought we were recruiters
- Trial: + premium job boards, Hiring Coach
- ↳ 7 days too short for many,

Now Trial:

★ Show 1 out of 3 results

↳ Much more successful



- Right product model
- Meaningful impediments
- Instant gratification
- Build engagement quickly → automation? 1:1?
- Q: Iteration speed?
- A: Not sure, 3-4 months?
- Q: Talked to customers?
- A: Yes, about what they valued

Oct 4, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

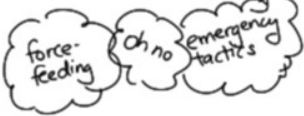
#torontoB2B

SUCCESSFUL TELEPHONE LEAD GENERATION

TREVOR HAMILTON

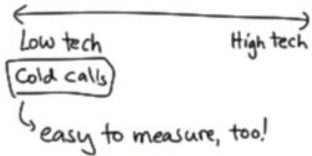


B2B cold-calling



Most people aren't very good.

script doesn't sound interested, so why should I be



Outbound calling

- Book appointments
- Event registration
- Lead generation
- Update information
- Get more contacts
- Gathering intelligence

Professional manner → relevant phrases
 Engaging → Get them to think
 Relevant
 Help people qualify themselves
 ↳ role, etc.

KEYS

1. Make the calls
2. Have good lists → tricky! target
3. Have a compelling opening } 15-20 seconds

Challenge?
 Getting someone live on the phone

NEED TO BE
 COMPELLINGLY
 SIMPLE

Different

Traditional → works okay for simple things

My name is _____ from _____

We work with companies like _____ and _____

We help companies to _____

Question, hook...

Issue-Centered → proof you know about the industry.

My name is _____ from _____

We help companies _____

I'd like to share a couple of pressing issues we are helping our customers with


} industry info

Q: Learning?


A: Remember what's going on at the other end of the line

Q: ^{Leaving} Voicemail?

A: More likely if junior
 Oct 4, 2012
 Notes by Sacha Chua (@sachac)
 LivingAnAwesomeLife.com

HydroStor
 compressed air for grid-scale power storage

Serial entrepreneur
 Small ← → Big

MaRS
 Bio CleanTech etc.
 Advice, Funding...

Lots of resources out there looking for people to help

TDBC MaRS ...
 Finding that key advisor
 ↳ Must be connected to **YOUR** goals.

Q: Non-debt financing?
 D: < \$100K, cut the budget down

< \$25K
 Toronto Business Development Centre (grants)

By the time you fill out the application, you'll have really examined your biz

MEDI, Federal (Fed), IRAP
 due diligence



the market → research services provided!

Q: MEDI mainly for export?
 Innovation, too (Ex: Northern Ontario)

Q: Grants?
 A: More non-repayable loans (conditions)

Moving stuff from CONCEPT to REALITY is really fun.

Research group: Ontario Centre of Excellence
 ↳ in kind! University

Funding is tough

You should do the grant work in order to understand your biz, but sometimes it makes sense to hire.

Partnering with bigger companies
 ↳ Lay your story out with clearly defensible points



Keep in mind what people want } checking credibility

STARTUP LAW 101: LEGAL LAUNCHPAD

ARSHIA TABRIZI @arshia_tabrizi

ARSHIA TABRIZI

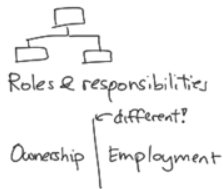


ENT101 October 10, 2012
Notes by Sacha Chua (@sachac)
LivingAnAwesomeLife.com

Partnership Tips

MARS video

Is this the right person to be partners with?
values
timelines
goals
roles
compensation
exit strategy



needed skillset may change
okay / need something else

Build in an exit strategy
in case of death, disability, major disagreements

Corporate Organization

\$750-\$1,500 basic full

Articles of Incorporation

- limited liability
- tax advantages
- IP centralization
- venture capital/acquisition

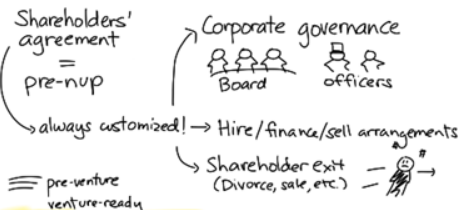
Separate legal entity

bringing other people's ideas together

- When do you incorporate?
- Employees/consultants
- contracts/relationships

In corporate work, Scrooge pays later. Don't cheap out!

Corporate structure:
Founding shares, voting rights, share classes



Questions (cont'd)

- Q: Finding the right lawyer?
A: Long-term relationship, so rapport & fit. Experience in the field you're in.
- Q: NDA for investors?
A: Practically, many won't. As a lawyer, try. (Esp. with angel investors, low deal flow)
- Q: No IP assignment document?
A: Employee? Company. Consultant? Consultant.

Intellectual Property

Protecting your primary assets

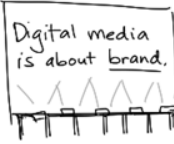
Example: Steve Jobs



Costs: \$10-15K full patent, \$2-4K provisional patent, ± Prosecution & enforcement

Trademarks

\$1-2K for registration, 6-18 months, BUT improper use → rights



Research your brands! Protect your brands!

Trade secrets

easy, cheap, no time limit/disclosure BUT watch out for traps in NDAs. watch out for big companies! sometimes they use IP assignment forms!

Contracts

Legally binding Agreement



Emails, letter of Intent, Memorandum of Understanding

May be legally binding, may not! You need legal reviews of LOIs, MOUs.

- Lawyers → manage risk
- protect IP
- sell company
- review agreements, etc.

We are here to be paranoid.

Questions

- Q: Pre-venture vs venture?
A: Simpler takes deals etc into account
- Q: Cost of patent enforcement?
A: several thousands just to check if you have a claim, way more to defend
- Patent → rights but you have to defend them
- Q: Provisional patent vs full?
A: Reserve that filing date, then file full after. can have pitfalls
- Q: Lean Startup?
A: Depends on type of company. Legal perspective, worried about incomplete
- Q: Demographics of ENT101?
A: Similar to MARS → organizer
Q: Hackathon? A: If you're willing.

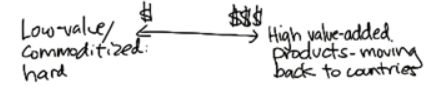


OCT 16, 2012: SMALL BUSINESS NETWORK FORUM

KEYNOTE: DANI REISS, CANADA GOOSE

Dan Reiss

Expensive to make in Canada?



Chinese market?

We do some business in Hong Kong & mainland.



Most successful businesses Own the whole Supply chain.



Marketing (collaboration with Drake)?

They've been wearing Canada Goose for years.



We don't pay celebrities to endorse our products → Authentic

Eur?

All Canadian, hunted & not farmed, happy to support people in the North, ethically sourced

Marketing to two different markets? Where are the biggest opportunities for your business?

International expansion?

Hired someone there, on the ground, growing the market enough to sustain an office.

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

Mentors?

Yes, many!



Important to ask a lot of questions



Family businesses



Succession planning is also important



Proudest moment?

Every time I see that video + Moving into new headquarters, remembering where we started + global brand



Q&A:

Financing growth without Vcs? Profits → very understanding financial partner (bank)



Reinvesting profits → continuing to do that

Decision-making?

Highly entrepreneurial



Front-line people



Marketing?

We just tell true stories.



Ex: film sets



↳ Big pockets, warm

From behind the camera to in front of the camera

We've always been very grassroots

bouncers



Scalpers

Wow, that must be warm

Balance life and work?

I don't. I think what I do is very energizing, perfect balance.



Financing?

100% privately-owned

Stay private as long as you can.



Profitability is important.

income expenses

Front-line people

3 keys to success?

Made in Canada



Everyone was leaving Canada.

We cared about staying

opportunity for competitive advantage

Swiss watch



Canada Goose jacket

can't make these in China

Fows?

Very good at not buying other businesses



Focused product line

must be made in Canada & best in the world

Culture?

Fun, casual

↳ Even bankers dress down for us



Important to set the culture from the beginning

how do you scale up?

Where is Canada Goose now? Truly global, >\$100M sales

Family business Thought I would never do it English Lit degree

Trade show in Germany COLUMBIA Same size as Metro Sportswear in 1995, then GROW!

How did they DO THAT? very humbling

I never thought, growing up, that I would be passionate about parkas When I heard the stories of people...

REAL & AUTHENTIC

I don't think there are many real brands these days



Brands themselves have been commoditized

Vision?

Canada's most admired local brand

It was easier to sell in Europe than here!



OCT 16, 2012: SMALL BUSINESS NETWORK FORUM

E-COMMERCE IN CANADA: Drew Green, SHOP.CA

Places where people shop

Amazon
eBay
Book Depository
Toys R Us
...
↳ no Canadian sites yet among the top

shop.ca → Huge online store, free shipping & returns on most products

Buying? Points for buying & sharing
Selling? Points for engaging

Q: Returns?

Business plan projection: 10% returns
Actual: 1-2% (surprisingly low)

11 months of development before launch

partnering is important

Now

Customer service



Industry average conversion rate

15%

↳ x cost per click = can be expensive!

shop.ca → ~15% cost, known ROI

Case study

Shoptronics.ca

~2 weeks onboarding

Aug 31 - Oct 15

\$500,000 annualized sales

Top product: Wireless baby monitor

Keys to success

Clear, high-def images

Complete, detailed descriptions

Quick shipping: ~1.3 days

Accurate inventory counts

↳ but e-commerce is only 2% of retail

Canadian e-commerce

37 million Canadians

27.8 M Internet access

14.2 M shop online

avg \$1450/year w/o travel, digital

9.2 Loyalty cards/household

First half 2012

2% retail growth
24% e-commerce growth

Agreement

100% of catalog (not just discount)

3-5 business days for shipping

Pays twice/month

* shop.ca handles marketing

↳ shop.ca extends returns to 365 days

Pays credit card fees

Growth: ~1000 members per day

Q: Dynamic pricing?

Updates every 20 minutes

Q: Food products?

Working on that.

Q: Competing with others?

Promotion off-site as well

Q: alternatives?

Shopify (Ottawa) ~<100 SKUs

Magento - larger sites

Q: huge e-mail list?

Metroland / TorStar partnership

Q: Separate site?

Yes, very good idea to have your own (although some retailers have closed their non-shop.ca site)

Q: customer service?

Can handle ~98% of questions, may take longer for more complex

Q: services?

Launching travel services soon

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!



OCT 16, 2012: SMALL BUSINESS NETWORK FORUM FIND CUSTOMERS, KEEP CUSTOMERS - Marie Wiese

(I missed the first part of the talk...)

Value proposition

✗ We have nice flowers

✗ We have the widest selection of orchids

over ___ varieties of orchids for immediate delivery in Ontario → getting there...

Tightly-defined buyer persona

Buyer priorities
Obstacles
Reference points

~~SMB~~
↳ not a persona, that's a segment!

Map your buying process to your website



information overload



stick-it-ism
→ too many things stuck on website

Remember your

call to action

Don'ts:

✗ Don't ask someone to marry you on the first date.



↳ Build gradually, warm them up

✗ Don't try things once and say "it didn't work"

✗ Don't try a tactic without an objective.

Some ideas on using Analytics

visits, new visits, visits by traffic type, goals, keywords, top pages...

Planning

Map your customer

- who they are
- how they make decisions
- what do they care about?

Imagine...
you hate your current provider, you want to hire someone once and that's it

Singular objective

→ ex: e-mail think in their terms

Google Analytics goal tracking: packages



Google Analytics is your best friend

① Wealth of info about people

② Clue to how you're being ranked



marketingcopilot.com

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!



OCT 16, 2012: SMALL BUSINESS NETWORK FORUM

OPEN RATES, CLICKTHROUGHS & CONVERSIONS - Javed Khan

Javed Khan

77% of Canadians prefer opt-in e-mail marketing
2% social media

E-mail marketing



Not about spam!

Don't just buy lists!
Report spam
story: someone got 4 spam reports and got shut down for 6 months

Microsoft Outlook is not enough!
headers unsubscribe ...

E-mail marketing - Mobile

81% read e-mails on mobile devices
TEST & optimize your e-mail for mobile

Tips from Mailchimp, HubSpot, mailermailer... A/B tests

Definitions
Open rate: $\frac{\# \text{ opened}}{\# \text{ delivered}}$
click rate: $\frac{\# \text{ unique clicks (and)}}{\# \text{ delivered}}$

Segmentation: 4.5% single → 8.5% Clickthrough segmented lists

subject lines
mailchimp study
"free" < "how" < "downloading" < ...

most post, jobs, newsletter...

TAKEAWAY: Tell them what they're going to get in your e-mail

Avoid spam-type words
"coupon" "upgrade" "discount" ...

measure Avoid sales-y jargon

Use the Google Keyword Tool } relevance # of searches

Effective subject lines

• Relevant • Persuasive • Time-sensitive

Ex: Preview our fall inventory
↳ 25% off your next purchase

Follow up regarding new lines
↳ Orders available now for our new line

Spend the most time on your subject line
< 15 characters if possible
↳ did he mean words?

↑ & → perceived value, increases open rates

↓ ? ↓ # looks spammy (avoid all caps!)

↓ (x) but ~ [x]

↓ First Name, looks spammy (but try it in the body instead of subject)

Be sure to A/B test with your own list

Ask for
First name
Last name
Company

↑ # of links → increases click rate, lowers unsubscribes
~ 6 links? Experiment w/ ratio (even > 20!)

Don't creep people out with analytics...

Give & Take

→ offer videos, webinars, whitepapers, etc.

Offers

1. Downloadable
2. Free trial
3. E-book
4. Live webinar...

Give something for subscribing

Timing

→ When other people aren't doing it
4pm - 4am: ↑ click
↳ early in the morning
4am - 4pm: ↑ open

Test time of day vs unsubscribe, etc.

Day

Early in the week

Frequency

once a month, etc: ↑ open more frequently - up to date

Best day: weekends? → test
avoid Monday

Reporting

50% in 6 hours
77% 24 hours
2 weeks - pretty much all the opens

Send frequent e-mails

Actions - Test your actions

Format

Text + HTML

Test - might come across as too markety

Sender head shot

Call to action

share buttons

Video - link to it as a popup, indicate file size & length

important - YouTube is distracting!

Resending

Wait at least 4 days, Segment list, reword subject, be honest

HTML mail

33% disabled images
→ must have big text banner

Next steps

E-mail marketing Service provider Start testing

If you need help, there are people who can help

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!



OCT 16, 2012: SMALL BUSINESS NETWORK FORUM

THE POWER OF NETWORKING TACTICS - Bobby Umar



Networking Process

- Develop a contact list
○○○○ everyone!
- Set up information meetings
- Follow up → otherwise, useless!

Information Meetings

Offer they can't refuse 15 minutes

Develop your elevator pitch
Must have questions 3 at least! ???

Think about your brand Research them online

① eye contact smiled } but not nod } too much

Hi Excuse me, Sorry to interrupt...
They're not going to say go away

Exercise:

- Leaving the conversation
- Pimp my friend
↳ compliment other people
- Say the wrong thing
If we can figure out the wrong things to say, we can learn the right things.

Online networking

LinkedIn Facebook Twitter Google Plus
future?

- solid profile
- groups
- ask questions!
- ask for advice
- update status
- connect soon after meeting
- likes, comments, shares
- personal relationships lead to professional ones

Personal branding

A promise to deliver an unmet need
personal: everyone you come in contact with
collection of experiences w/ names, logos, symbols.
increasing happiness

Example: Dove, real beauty
Final thoughts communication passion
Personal branding
You gotta want it!

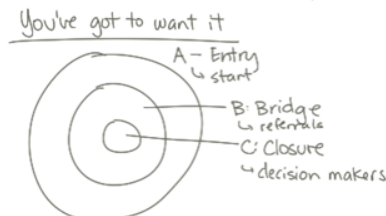
500 → 75 → 17 → 2
people got card followed created relationship

EXERCISES:

- Elevator pitch
- Question/Answer/Question/Answer
↳ moves conversation forward & gets information

Keep your introduction SHORT

Go with the beats come in



Every person is a bridge to other people.

My favourite question is
How can I help you?
also for people's passions & hobbies

Gary Kasparov story parking lot autograph you gotta want it!

Ask the right questions...

True story!

Do you believe in God?
Do you?
I don't feel comfortable talking about that.
So why did you ask?!

Know how to end a conversation
→ excuse yourself, determine a follow-up

Half the world is shy. Bring people in.

Q&A:
- Maintaining/building relationships? Categorize, spend time with them Annual letter, Christmas card
- Rewarming a cold network? Be honest & clear about your reason.
- Building relationships w/ execs & admins Ex: LinkedIn Group, coffee/breakfast

Q: Multicultural? Canada: honest, relaxed. Some cultures more formal. If you screw up, apologize right away front.
Q: LinkedIn intro? Be honest. Don't ask for too much up front.

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!



Marissa McTasney
Moxie Trades

Marissa

women in construction

work boots for women

@moxietrades

how financed?

Funded it myself, remortgaged, got a business loan, refactored, got angel investors, Dragons Den
↳ now have distributors who fund invest

First day - I wanted the boots for myself. women really responded. It was a cause. My goal was getting jobs for women in the program.

Purchase order
\$40,000 of work boots



stay-at-home mom

loan from Business Development Bank of Canada

Sell first before you try to raise money.

then you can come with a purchase order

Distributors-partners (but can be distracting)

Cashflow management

Pre-sell as much as you can - almost as good as cash

Big businesses are good, but don't care, lose-lose

you can say no

Independent businesses relationships simpler

Advice?

- Do your homework
- Product
- marketing
- customer service
- who you are

I'm competing with my top clients.

Do your research!

Mentors? Yes, but also your own vision. You make the decision.


Manufacturing Alibaba - one factory in China was the only one who got back to me

Angel investors
↳ Take advantage of their experience, make sure they're in it for the long haul

Dragons Den
Auditioning the new Dragon
Story about selling nothing buyer bought!

Prep
↳ media coach
↳ finance grilling brought my own photographs & videographer

craft answers



Erica Ehm
Yummy Mummy
Connecting with parents
@yumymummyclub

Erica

how financed?

myself, just time.
costs → started cold-calling potential sponsors
relentlessly badgering people, dreaming up programs.
Now close to \$1M

How did you resist the urge to get more money?

Some people wanted to invest.

I asked questions

They lost interest when they found out I was savvy.

staff: lifestyle > money

I don't know if investors want to hear that

Pricing

Making things up
Analysis by an actuary to determine actual costs

under-charged

bankers are good too

Firing

I fired my sales agency! Contract → not in my best interest

Don't you trust us?

Don't put all your eggs in one basket
↳ make sure you can also self

Entrepreneurship

Risk averse → if prudent & careful

Grit quotient

↳ persistence
That's my strength.

You have to have grit.

You can't be making just a product.

Self-financing?

Yes, just be prepared to work really hard. 4 years to build this.

Selling ads?


Old network (crappy).
★ Integrated programs → labour-intensive but premium

Be creative → call people up

Don't say JUST

Mentors

You have to find them.



Roy Pereira
Digital advertising

Roy

How financed?

Self-funded through consulting. → fund development
You have to demonstrate a viable product
traction, awards

Maple leaf angel group (500k initial seed) allowed me to hire

"We" makes it look better
Just closed another round

Canada: SRED tax credits, FEDDEV (matches funds)

What are you giving up?

This is my 5th startup.
You give up a lot of control, but I'm okay with that.

Think about the exit

smaller slice of a bigger pie
C100 - tech entrepreneurs mentoring people

Hire a really good lawyer.

↳ make sure all your financing contracts are clean

Tech industry angels → some do it for fun, not just money

How did you decide how much money you need?

I needed to compete globally, so that takes money. I'm going to grow it as fast as I can. A few million dollars to get to that valuation.

Passion is important.

Trust me → red flag!

build for pain points
Friends & family very likely to lose money!
Try funding through consulting angels, etc.

Advice for VC funding?

Web etc. great for building things for free - easy to do
low barriers
VCs are far away.
↳ \$1M/year revenue, okay.
↳ very rare
Not just ideas → execution.
Prove it, get customers who pay. Listen to them.

Connect

You never know where it might go
↳ not just pitching

Angel investor asking for return rate? Walk away. Not a SBC, not a dividend.

local, understand your business

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

Don't give > 50% - one round isn't going to be enough.

More angel investment, private equity

Partners can bring you customers, etc.

Mentors

Canada was pretty empty, but now more people are mentoring, talking.

Meetups
StartupDrinks.ca
angelinvestor.ca
gust.ca

DIFFERENT TYPES OF ENTREPRENEURSHIP

KERRI GOLDEN
ALLYSON HEWITT

Why do you want to be an entrepreneur?

Make money? Make a difference? Both?

VIDEO

Better way to do venture in Canada? PushLife (example funded startup)
The pitch Hiring people
music on ☺ autonomy
old phones ☑ Control
★ making a difference

Motivation: create something

What do you need?

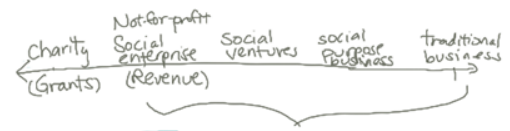
Space - doesn't have to be an office
Coworking (ex: MARS Commons)
Basement, etc.

Idea

Who has done something similar before?
Did they fail? Why?
Can you work with them?

Business model?

Not-for-profit → For-profit
Cooperative Hybrid
Ex: MARS
See whitepaper on choosing structure ↗ MARS



Your investors need to be on-board. Target zone
Combining profit & for-profit can be amazing!
Let's Talk Google.org

TYPES OF ORGANIZATIONS

Consulting small ↔ big
Strategic alliances to work together virtually

✓ low starting costs Liability insurance Hard to scale

Services providers → broker (possibility!)
but don't forget that scaling through hiring & training takes time.

Social Ventures - Services

Ex: A-way Express } also social
Good Foot Delivery }

Service example: JUMP Math

Transforming education ← funded by the Gates Foundation

Product organization

High development & marketing costs, sales & distribution, production costs...

Huge potential for scale, though

Asset sharing possibilities ZipCar, Bixi, pre-sold

Ex: ReStore, me to we style

Video:

Grassroots crowdfunding small change fund
community initiatives → marketing → fun

Q&A:

- Coops: for-profit or nonprofit? Either.
- equity-based crowdfunding? Not in Canada.
- B-corp? US-separate type. Canada: ISO checklist. ↳ helps with impact investors
- Liability insurance w/ corporation? yes
- TSX listing? Not fresh startups - expensive.
- Impact investing medium/long-term? projecting pretty substantial.

FINANCING

Bootstrapping

Self-fund - possible in many businesses

Fundraising

Coops, grants
Note! Granting agency will want to report your success financial performance.

Debt

But once it's paid, it's paid!

Equity

Doesn't have to be repaid... but keeps paying forever (or until you buy them out)
Better for early stage, riskier things than debt

SOURCES

You & skin in the game!
Family, friends, & fools
Turkey principle
You'll be sitting down for turkey with these people, so make sure you're making a difference (b) they can afford to lose the money
Venture capital funds cvca.ca
impact investments (ex: SVX)
Lots of other resources: ResearchNet, NSERC, IRAP, Foundations: Ontario Trillium, Gates, Imagine Canada
Angels high net worth individuals, private investors
accelerators
Bank (not for girls/losses) but try the BDC

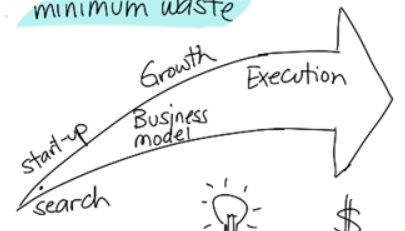
Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

MARS ENTREPRENEURSHIP 101 (#ENT101)

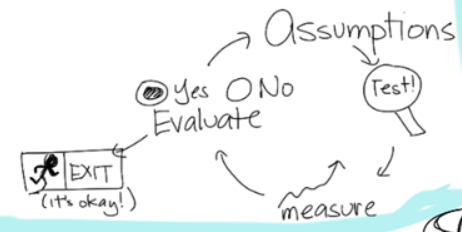
ENTREPRENEURIAL MANAGEMENT

JON E. WARREN  *Jon E. Warren*

identify a sustainable business model with minimum waste



Customer problem → product solution? → business model



Time studies → Taylor + work studies
 Managers plan, workers work.
 Scientific management
 steel factories



Muda: waste
 Hansei: Learning
 Kaizen: improvement
 Jidoka: self-learning

Toyota Production System

Agile Development Manifesto

customer collaboration
 dev dev customer
 fewer documents more conversations iterations

Lean thinking
 From factories...
 to all businesses

customer value

Customer Development

1. prioritizing business problems to solve
 2. customer acquisition
 3. scarcest resource, so understand the process

Notes by: Sacha Chua (@sachac)
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Step 0 Describe idea

write it down!
 Thinking & talking → fuzzy

Step 1 Review assumptions

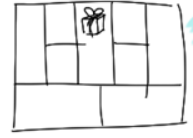
Ideally with someone else!
 Measurable facts
 focused efforts \$ clear impact

Step 2 Test

Key piece of information
 Running Lean
 validate assumption
 invalidate assumption
 customer interviews
 better for B2B but hard to do well!
 Most people are not good interviewers
 Try doing 50 interviews.

Steps 3 & 4 Measure & Evaluate

Willing to pay for it?
 Especially:
 early adopters (already paying for it!)
 people already looking
 Review your [] from step 0
 Validated?
 Iterate → change features
 Exit!
 pivoting
 easier when:
 low sunk costs \$
 low traction
 clear feedback
 clear next step
 persist?
 be honest!



Business model canvas

Value proposition → core
 what you offer → how you offer it → value/benefit
 how value is generated → difference from others

Summary
 startups are different
 focused on learning

Minimize risk by breaking up the process

customer problem
 minimum viable product
 customer acquisition

\$ most will bootstrap
 waste

Human element: have someone keep you accountable!

PROCESS > idea

Lean Startup

Customer development + agile development

Build → Test → Measure
 Lean Coffee, Toronto

Q&A: Don't ask people to be your customers in your interview! Asking w/o selling

Company building
 Customer creation

Customer discovery → Customer validation



AndroidTO: Oct 25, 2012

Design - Kim Pimmel



CKpimmel

Kim Pimmel

Design & great experiences



Photo
graphy
Film:
You have to be
DELIBERATE

You have to be
..... READY

I ♥ type
abstract
composition



Light painting



Thousands of digital photos
short movie
Light Drive

Macro lens
everyday objects
oooh

Extraordinary things
can come from
ordinary things.

GREAT
EXPERIENCES
sometimes
only come from
EXPERIMENTATION

Ferrite
fluid +
Soap
bubbles
Compressed O2
video



Location-dependent applications

Life before Android



Computers for everyone

GRA:
Q: Responsive?
Yes, I like starting w/ mobile first

34 million activations in Canada

500 million around the world > population of US.

Instagram
↳ Drives app adoption

You never know how people are going to use your app.

Make it a great experience.
Make it beautiful.
Make it move



Notes by: Sacha Chua (@sachac)
Check out more sketch notes at
LivingAnAwesomeLife.com!

How Wattpad's Android User Base Drives Success - Allen Lau & Mike Beltzner

Last month:
2 BILLION MINUTES
on Wattpad
stories

Over 70% of traffic from mobile devices
Most from Android

sub-\$100 phones
Demographic Geographic
We are seeing a lot more traffic outside North America

Mobile adoption faster than expected
Zynga

Not as easy to make money on Android!

J2ME → Android
Java
Highly fragmented Carrier app stores...
Haven't we seen this before?

ADVANTAGES

- ▶ Google Play
- ▶ statistics on crashes, etc.
- ▶ beta programs, hosting APKs
- ▶ Discovery Install
- ▶ Allow automatic updating
- ▶ Faster review, fewer limits
- ▶ Interaction w/ users

Platform

- ▶ open source API
- ▶ widgets @ glance-friendly
- ▶ A → B share intents

Marketshare



CHALLENGES

young developer ecosystem
↳ tools
↳ talent

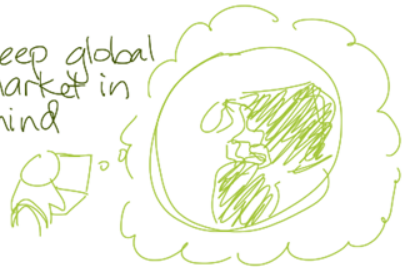
user interface still evolving

androidniceties

many ugly default apps



keep global market in mind



Make the most of Google Play



Consistent experience



Mobile first!

But fragmentation

Different business models for iOS & Android?

Android → more rapid iterations tech & business

Q&A:
 Q: Making money?
 A: Currently free.
 Q: iOS vs Android?
 A: Android cheaper - make it up in volume? maybe people cheaper?

Notes by: Sacha Chua (@sachac)
 Check out more sketch notes at LivingAnAwesomeLife.com!



AndroidTO: Oct 25, 2012

Good Privacy Practices for Developing Mobile Apps - Vance Lockton, Melanie Millar-Chapman

LEGISLATION

Office of the Privacy Commissioner of Canada (OPC)

Privacy Act for public sector

Personal Information Protection & Electronic Document Act (PIPEDA) and still relevant!

GUIDANCE

① You are accountable for your conduct & your code.



② Be open and transparent about your privacy practices.

Be proactive! I agree

③ Collect and keep only what your app needs to function, and secure it

Does this make sense?

← reasonable person

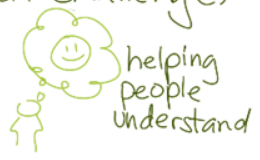
NOT OVERRIDEN BY CONSENT!

allow opting out **4 point test** Necessity? Effective? Proportional? Alternatives?

④ Obtaining meaningful consent despite the small screen challenge.



Not about covering you



⑤ Timing of user notice and consent is critical.



GET THE GUIDE



Billmonk has a nice privacy policy. simple → more details

Moving forward: Contributions?

Funding for initiatives

↳ nonprofits, \$50K/project 1 year

Nov 30 deadline

- Q&A: ?
- Q: How do we get better?
- A: It's a challenge & we're working on it...
- Q: SDK?
- A: Crypto that meets standards? But we're technology neutral. Developing industry standards?
- Q: International?
- A: USA pretty close. You need to still look. Also, Canadian reg apply to any substantial connection to Canada

Notes by: Sacha Chua (@sachac) Check out more sketch notes at LivingAnAwesomeLife.com!

OPINIONS



Data on my phone is private

I have uninstalled apps because of privacy concerns



9 out of 10 people concerned about company use of data

I would rather lose my wallet than my phone. 1 out of 5 people



AndroidTO: Oct 25, 2012

The Secrets of Being a No.1 App & Not Losing Money - Gary Yentin @AppPromo



You have to do SOMETHING on a regular basis

In Google Play, slow & steady wins the game
Top categories
Entertainment
Personalization
Books & References

Search

Organic users 50% more likely to become long-term loyal users
Search 75%
Social Think about making a video!

- Keywords → Test these!
- Frequency of keywords
- Net installs (- uninstalls)

AppBrain stats
26% low quality
or decommissioned by Google

Test

You can update immediately

- Presentation
- App name
- Logo
- ...



Spend wisely

Ad networks → Test
Acquisition cost, revenue

80% of apps don't generate enough for a sustainable business



app store optimization

Keywords at least 15! app title, description, social media

| | |
|-------------------|-------------------------|
| 75% | 25% |
| Free -advertising | Paid \$2.5-5 sweet spot |

Freemium harder than advertising → make sure you reach out to users to upsell them

monetization strategy

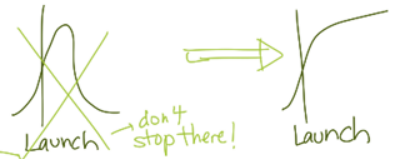
who is your customer?
cost of acquisition?

choosing a strategy

320x50 call to action banner



- Q&A
- Q: Choosing ad network?
A: Understands you, good service.
- Q: Search primitive?
A: People use it, could use it more.
- Q: In single app store, when to expand?
A: Traction, feedback from users
- Q: Android as staging for iOS?
A: See also Amazon, carriers. Test keywords, banner, etc. Easier to test on Android



25% of apps < 50 downloads
That's pathetic

Resources
App Promo
Distimo
Flurry
...



Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!



AndroidTO: Oct 25, 2012

Mobile Apps: Web vs. Native - Anthony Kanfer

There's an app for that!

Sesame Street

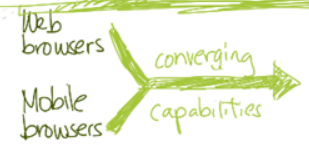
↳ ubiquity of apps

COMPARISON CRITERIA

| | Web | Native |
|---------------|-----------------|---------------|
| Usability | getting better | awesome |
| Capabilities | sometimes | good stuff |
| Development | easier, cheaper | pricey |
| Findability | potential | maybe |
| Monetizations | traditional | split the pie |

If you can't improve on a web app, you probably shouldn't be native.

Mobile → now table stakes



Web

Supports all devices open technologies

↳ multi-channel world

HTML5 is going to save the world!

(not quite there yet...)



Maybe responsive design + server side?

Browser "standards"

Development

- Common Skillsets

easy iteration

common codebase

easy to find, easy to start with

Payments → known models

security

Remember: touch interface

Hybrid apps trade-offs, expectations

Mobile context is everything → Not just a web app

Native Apps

Faster!

New hardware capabilities, system events

Background processing

Widgets

Notifications

Development more specialized, talent

Separate platforms, designs, OS update dependencies

App store → fickleness, time to market

Innovation ← Standards trail innovation

"Discreteness" can be seen as one thing

Notes by: Sacha Chua (@sachac)
 Check out more sketch notes at LivingAnAwesomeLife.com!



AndroidTO: Oct 25, 2012

I Wish I'd Known That When I Started, Chris Haseaman



Your app won't work perfectly on all devices.
ask for info, turn people into advocates

Myths of Android Development

- Ugly Simplicity is about doing less
- Phones are always connected
- Users will trust apps from the Play Store.

Android can be pretty!

Singerbread isn't by default → Get rid of the defaults!
still 50% of the install base

Read the design guide → Understand the rules → Break them when appropriate

You should never take "No" from a developer.
pixel-perfect design pays huge dividends

"Borrow" from the things you like.



Never waste a mistake.
his mom → people who care



Small screens need clean interfaces

Limited attention span → 60s

Simplicity & Responsibility

Resist settings overload
Kill clutter & unused features
→ Google Analytics, Flutter

Experiment BUT taking things back out may cost you.

Don't offload complexity to your users.

Make good decisions for your users



Story about feedback on post status

Connection



When are people using their phone?
waiting in line already impatient!
Fetching data costs resources...

Q&A?
Q: Designer?
A: Beautiful stuff, flexible, pushes developers.
Q: Tumblr users?
A: Inspiring, dedicated
Q: Prioritizing?
A: No rule, Sprint list, constant conversation

Should be seamless. People should never worry about their connection.

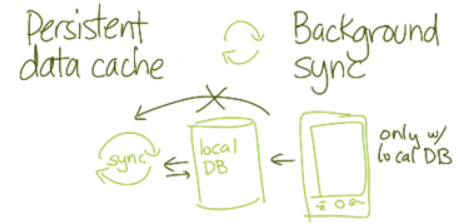
Hide unreliability, but don't lie.

Analytics super-important!

anti-bully, anti-troll Look for themes

Notifications

- Pre-fetch data!
- Don't show spinners, progress bars* unless absolutely needed.
- Batch requests. Radio is expensive to start up



Watch battery use

You will be blamed for things other apps do
Note: Vocal minority are unhappy
be careful about listening to the right people
angry!

First app FREE → build trust → permissions, support, refunds, free access → RESPOND!

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

#SMref Oct 25, 2012: Moderated by Terry Foster

Panel: Matt Juniper,

Patrick Thoburn,

Quality & Quantity
mutually beneficial partnership

Many sponsored posts don't feel real.

Genuine interest Show your homework!

We're looking for staying power.



but what about blogs?

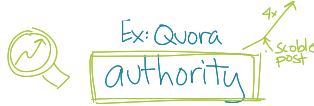


Q: Pay to play budget?
A: Absolutely. Separate budgets.

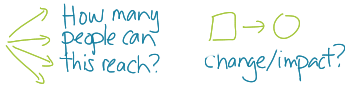
Q: Risk, giving up control?
A: Experts in the field. How did people treat other brands in the past? Similar risks w/ spokespeople.

Q: ROI?
A: That's why we also have to look at quantity. Also set expectations regarding uncertainty.

Scale & impact



10K followers ★★★★★
usually high-quality content



Not just reviews Co-creation content, products...

Discovery tools, ad tech

The idea of Klout is fantastic. ... Lots of wrinkles there, though, ... Work to do.

Algorithm can be gamed..

Influencer outreach is dead.

Offline → purchase decisions Online → just a channel?

Must focus on co-creation, scale Long-term relationships



More acknowledgment of sponsored posts now It's okay

Q: Risk, giving up control?
A: Influencers - independent voice, some jobs... co-creation → more control

Q: ROI
A: CPM basis, influencers very inefficient. Co-creation & paid media

THE CHANGING NATURE OF INFLUENCE

Ron Nurwisah,

What's the platform?
What's the next step?



Starbucks, Instagram

Not just one story, a column, a platform

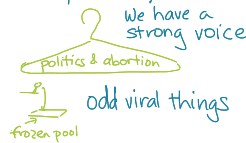
return/feedback from influencers

of followers : impact?

Morning!

Justin Bieber

Huffpost impact?



viral videos book-marked! maybe serious posts

frozen pool

Eric Alper

Picking specific people

Being authentic note this word, but that's it

Fans are easy to find coffee 7am-11am

Anything can be bought sold

More than just ego You have to have your goal Something they don't have access to

Klout → surprising! I like the idea, but on the other hand... nothing replaces doing that research.

Don't want to sell out my audience NO SHILLING For coolness, not payment no obligation

Most people would love to have real interaction.

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

Vass Bednar, policy wonkstar

I want to challenge the idea that **POLICY** and **PLAY** are incompatible.



board game?

WICKED problems
↳ hard to unravel/solve

Public policy is a 4-player game

Public service | NGOs
Referee: Media

Experts | private sector

where's the public?
reactive, not proactive

Policy vs. policy
more formal → bills, laws, constitutions
↳ articulations of standards
Ex: games for public good
policy is where people can start getting involved
There is a serious space for **play** in policy.
Creative Solutions

TEDx Toronto, Oct 26, 2012: Notes: @sachac

Ronald J. Deibert

When was the last time you've read your ISP's Service agreement?



Wiretaps! other countries!

What does Facebook know about you?

Location messages
logins machine
deleted items ...

Chinese version of Skype

Would you like to go to [redacted] Square?

↳ tracing this to a computer in China with unencrypted personally identifiable data!!

Botnets, spyware... now with 24/7 support!
Commoditized espionage

Fear → Folly policies, etc.

Future of Internet global → demographic shifts. Governments spying on citizens.

We need to protect the Net.

I want you to become hackers
↳ curiosity about tech, experiment

TEDx Toronto, Oct 26, 2012 Notes: @sachac

Angie Draskovic



charity vs earned income \$
more sustainable

Impact of small decisions →

Find the person in your organization who makes buying decisions, and consider social sourcing.

KEY POINTS

We're going to spend this money anyway.

We can choose where to spend it.

Let's spend it in a way that empowers people for life.

TEDx Toronto, Oct 26, 2012 Notes: @sachac

Ryan Henson Creighton & Cassandra Creighton

Sissy's Magical Ponycorn adventure

drawing, voicing a game @ 5 years old

My hope is that it will be normal for kids to create with technology

not just consume

Not about the latest tech

Participation

Mastery

We should be teaching kids creating & programming by the third grade at the latest.

We're not expecting much of our kids!


CREATORS not CONSUMERS



Notes from TEDx Toronto Oct 26 2012 by @sachac


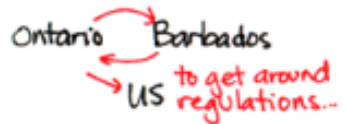
Marcelo da LUZ

The pain of not following my dream became unbearable.



The hardest part: BELIEVING.

I stopped counting after 1,500 "No's."

In Alaska, someone called 911 to report it as a UFO...

I am from this planet!

First electric car to reach the Arctic

Driven across the Arctic!
challenging roads
low sun

36200
Kilometers using only sunshine as fuel.

250Kg - I pulled it (in Ontario) by hand to challenge people to do their share

Oil makes access to goods ubiquitous. (almost)

We have to find something that acts like oil.

Flaxseed?

↳ does not compete with cooking/food uses

40% oil biodiesel, etc. 60% meal flax flour, etc. Omega-3

Precedent: Linoleum ↳ from "linseed" → flax

Sustainability We can do it!

Imagine how the lightbulb happened...

Isha Datar

in-vitro meat

Environmental impact of eating meat:
18 ears of corn
water for someone for 5 years

Production costs >> transportation

Most people decide meal by meal ↳ sliding scale of sustainable eating

What if we had an Environmental Facts label in addition to Nutrition Facts?

up-front information, meaningful decisions



TEDxToronto Oct 26, 2012 Notes by @sachac

Susur Lee

Family memories of food

Dimsum

Cantonese black-bean sauce

Mmm

Came to work in kitchen with family

Kitchen community

Different food cultures

European & Chinese culture ← combining ← Ohhh!

Putting different countries on one plate.

Experiencing different cultures, different kitchens, tools...

TEDxToronto Oct 26, 2012 Notes by @sachac

Jon Dwyer

overfishing → unsustainable communities
Oil is our cod. except we know we're running out of it
oil ↳ even hybrid cars! plastics, etc.

The green industry hasn't created a sustainable, successful financial model. subsidies prices ↑

We have to treat oil like heroin to break our addiction.

TEDxToronto Oct 26, 2012 Notes by @sachac

Dr. Joseph Calazzo

7 conditions 75% of medical spending

I'm sorry for your loss. But just remember... you're next.

Home hemodialysis
Two big needles every day!

Baby boom & healthy children

Technology is unnecessarily COMPLEX.



How can we help patients care for themselves?

reward: iTunes music & apps!

Tested over 3 months, ↑50% tested w/ BlackBerry

20% lower risk! Behavioral intervention → awareness & self care

People need access to their data.

How do you live well with chronic illness?

TEDx Toronto Oct 26, 2012 Notes by @sachac

Sonya JF Barnett, Heather Jarvis

virus: infects, spreads, damages

easily transmitted also, language!

Dehumanization
ex: slut → used to mean "untidy woman"

I can still feel the sting of that word 25 years later.

EXAMINE LANGUAGE

So many times... Eventually: Is it my fault?

It gets really exhausting fighting words all the time.

Weakened immune system...

You're blamed & shamed for being sexually assaulted.

Bad things happen to bad people. So... am I bad?

victim blaming, dehumanization

We need to challenge the reasons why people label

Shawn Micallef

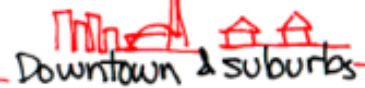


multicultural city → because of the suburbs!

No urban vs suburban divide. We are one city.

Strip malls are like Main Streets
suburbs more "downtown" than downtown.

cupcake Urbanism
not diverse enough



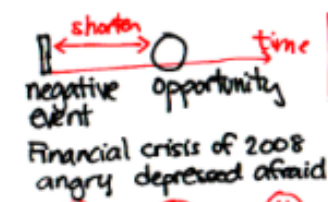
We are one city. Get over it, embrace it

No more hate for suburbs!

TEDx Toronto Oct 26, 2012 Notes by @sachac

Stéfan Danis

Life is messy. Adversity is INEVITABLE.



TEDx Toronto Oct 26, 2012 Notes by @sachac

Feelings Words The race!

I focused on health toughest challenges?

Everest? No, people die. Footrace in Gobi Desert?

Training: I ran only when I didn't want to.

Injury! practise in pool

Gobi: changed relationship to adversity. I can thrive!



Obstacles → Dismiss or befriend

I forgot that I wasn't a runner.

Oh no, inner critic

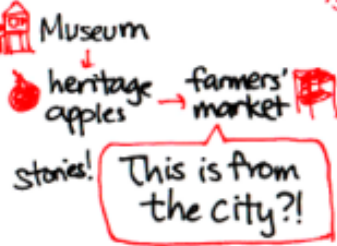
someone blazed past me. motivate me more.

Laura Reinsborough

2012 I live in an orchard.
I realized this when I picked fruit from a tree.

fruit goggles
→ I started seeing all these fruit trees!

When you engage your **WHOLE** self, then something changes.



fun ⇒ joy



We produce so much food & many people go hungry.

TEDxToronto Oct 26, 2012 Notes by @sachac

Steven Page

opera

Singers are master manipulators.

A song can take you somewhere. ❤️
Songs & analysis

the voice as a weapon
harmony

Silent night
Hoody niight
A PALL is CALM

Looking for that thing that connects people

Don't think about what you hear, think about what you feel.

I have to feel myself as well as the audience.
But then it gets transformed

There's been a chorus all along
La la la la la
FEEL YOUR VOICES TOGETHER (even the lead ones!)

TEDxToronto Oct 26, 2012 Notes by @sachac

Barbara Arrowsmith-Young

We can shape our brain.

I was told I had a mental block, when I was a child.

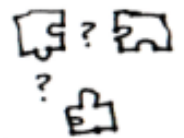
If there's a problem and no solution, you have to go create it.

working harder on relationships, brain exercises

First, you have to understand it.

and they worked!

the brain could change!



someone with the same brain!

Neuroplasticity

You need to learn to live with your limitations.

Vision: Cognitive exercises are normal. Engaged learners.

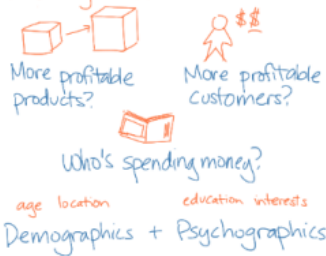
TEDxToronto Oct 26, 2012 Notes by @sachac

SOHO SME BUSINESS EXPO · OCT 30, 2012

COME ONE, COME ALL: PROVEN TACTICS TO HELP WIN NEW CUSTOMERS

ALEX CIANCIO
TD SMALL BUSINESS BANKING

① Know your audience



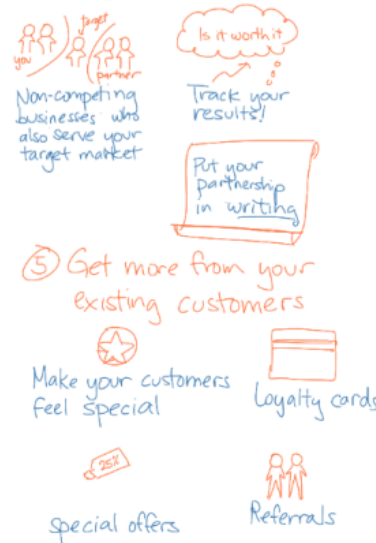
② Refresh your offerings



③ Energize your marketing



④ Partner to get new audiences



Get them to spread the love

- Q: Reasonable timeline for social media efforts?
A: You want to make sure people are going there.
- Q: Old-school advertising?
A: still useful
- Q: Most memorable call to action for business card?
A: tear-off strip for bakery discount
- Q: Typical marketing budget?
A: 3-5% of revenue, depending on margin
- Q: Typical errors?
A: Poor forecasts especially over-forecasting
- Q: Financing? Collateral?
A: TD doesn't do a lot of startup financing. Maybe property? Good forecasts? Does not finance inventory or cash flow.

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

SOHO SME BUSINESS EXPO · OCT 30, 2012

CONTENT STRATEGY - THE FOUNDATION OF SEO AND SOCIAL MEDIA JEFF QUIPP

Social media
↳ power shift

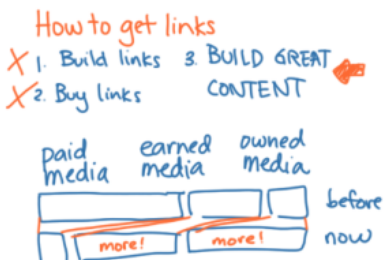
People → experiences
Share → content

Google made 550 changes in 2011

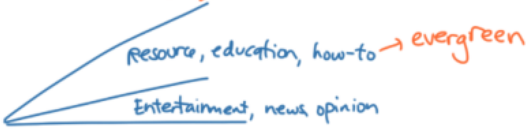


SEO is no longer a technical discipline.
↳ <head>...</head>

Now marketing



Resources vs Entertainment



TEXT CONTENT



Summary summarize paragraphs with headings

everyday language

Finding great topics

1. LinkedIn Answers, Quora, etc.
 2. Keyword research tools
 3. Sales & customer service
 4. Competitors' topics (topsy.com)
 5. Ask
 6. News
 7. Combine ideas
- ↳ also analytics ← Twitter

Content sales funnel



This is a process

Start here if you have a small budget

Product/service resource

Promote your content

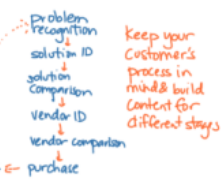
1. Facebook
2. Scheduled Twitter posts
3. Pinterest
4. LinkedIn
5. Google+
6. StumbleUpon
7. Digg, reddit
8. E-mail newsletter
9. E-mail sig
10. RSS feed
11. Comment w/ link
12. Guest post
13. Influential blog
14. Vanity bait

someone's name

↳ many people have alerts on their name



The purchase process



Avoid me too content

↳ Hubspot blogging study

purchased? quality for sharing

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

TOOLS, STRATEGIES & BEST PRACTICES TO OPTIMIZE YOUR ONLINE PRESENCE

JEFF QUIPP

Social media:
word of mouth
enabled by tech

connect with
people you might
not otherwise chat with

Advertising is a
tax for being
unremarkable.
someone

Getting started:
Wordpress

Update your website
often → frequent
search visits

Pinterest,
Instagram for photos
↳ build a following

Remarkable content
↳ test with StumbleUpon ads

Social media success
BlendTec:
Will it blend?
↳ remarkable content

Article syndication
penalties
(Google Penguin)

Testimonials on product pages,
stuff that people want to share



CREATE GREAT BUSINESS

PAUL TOBEY

the watercooler
of the 21st century

microblog
microblog → blog

An hour a week
has tremendous
impact.

Timing:
how-tos, conversions
↳ any time, esp. when
your audience is reading

Hypnotic
marketing
focused
mental
state

You can't manufacture
a viral video.

GET TO THE HEART OF BUSINESS

Don't forget
YouTube,
reddit..

WordPress SEO
All-in-One

Facebook
advertising
↳ long-term
nurturing

Webinar
Boring is bad
Think context

LinkedIn connections
The money's in
the list.

MIKE AGERP

another
distribution/comm
channel

YouTube: 1-2 minutes

5min ← 2x views of
how-to videos
YouTube

Time management
Calendar → batch → schedule

Get that content down.

Get going & be consistent.

Establishing yourself
as an expert
- guest blogging
- newspapers
- other media

Title, tag videos
Research virality

BE PASSIONATE
ABOUT YOUR CONTENT



you have to establish
expertise
↳ ex: webinar chunks

Editorial
calendar
↳ start here,
then choose
channels

Pictures → inspirational:
Pinterest

Webinar → time

Target audience blocked?
Tailor your content (no YouTube, etc)

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at
LivingAnAwesomeLife.com!

STARTUP COMMUNITIES AND ENTREPRENEURIAL ECOSYSTEMS BRAD FELD

Boulder, Colorado  100,000 people

Started to discover interesting things

Small town, creative class, 25% from university 

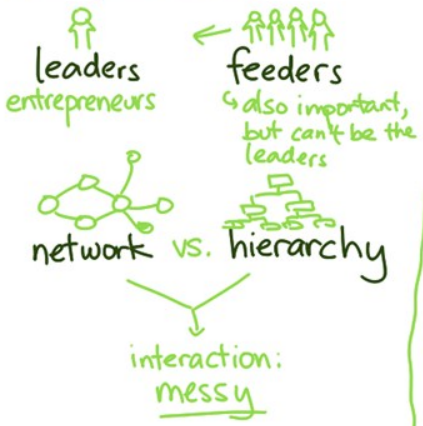
Lots of engineering talent, but no sales talent or management talent
other people



Q: Boulder/Denver? A: Story-exporting culture density

THE BOULDER THESIS

1 The startup community must be led by entrepreneurs. 



What makes a startup city work?

Value of engaging
- hiring
- learning
↳ plenty of benefits

Q: Examples of awesome ent.:
A: RRR (lots, more in books)
Q: culture
A: Natural resource-frontierish
↳ intellectual, emotional, etc.

2 You have to be in it for a long time.
↳ 20 years ahead, generational

The cycle of startups is very long.
Gov: 4 years
Edu: 5-7 years
↳ ride out the ups & downs

News is just entertainment 

3 Be inclusive of everyone at every level. 

The society rejects bad actors.
It's not a ZERO-SUM game.

Q: Angels & VCs?
A: Never a balance of supply & demand. Shouldn't worry about it. Many communities didn't rely on VCs. Lots of seed funding → muscle & experience. Accept chaos, focus on growth.
Q: Failure/challenges?
A: Feeder over-control, leader not sharing, hierarchy dynamics

4 Regular events to engage people
creating { Startup weekends, meetups, accelerators 

Lifetime achievement 

Give before you get.

1: advisor vs mentor
in exchange for...  How can I be helpful? 

Q: What is expected?
A: Nothing. No expectations, no need to ask permission.

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

PANEL: BUILDING A WORDPRESS DEVELOPMENT BUSINESS



Shannon Smith

Q: Size?
 A: On my own
 B: 4 core devs/designers + freelancers
 C: 8.5 (I'm the .5)
 D: 4, product-focused
 E: 7 people, product-focused (WPtouch)
 1.2M users, knowing when you're at that point
 G: Just me, on contract
 H: On my own, hiring 2 people full-time



Tom Auger



Brent Kobayashi



Dave



Dale Mugford



Trevor Mills



Marko Heijnen



Q: Pricing for new developers?
 C: Be respectful of what it really costs (ex: unbilled time).

Q: Clients want legacy/stability
 C: You can probably raise your rates

Q: How to improve your product
 D: Product dev different from consulting. What product to build? Finding gaps. Sooner you get feedback the better. ~2 months is about right.
 E: Pick 1 or 2 attributes & compromise on everything else. Help clients see the essential. Scrutinize. Don't just add to add.
 Ex: Chrome, Firefox → overweight

Q: Taking it to the next level - growing an agency?
 C: Go into a different business. i) Only started being in business when I started selling other people's work. Funding or job. Choose your timing well.
 B: Your life gets really different. ↓ code, ↓ design, ↑ HR/admin. Decide how big you want to scale. 4-5? 10? managing people vs pixels
 team isolated from the work

Q: Time management?
 A: 4 kids < 6 years old, WordCamp, etc. Possible.
 1. = Prioritize. Remember why you're doing things.
 2. = Lists. Add things slowly. Trust your own system.
 3. = Be really organized.
 B: Time management in project & time mgt in life. Getting better at project mgt - plan, experience. Doing a lot of this work again & again.
 C: Learn to say no. Learn to set/reset expectations.
 D: "No" is critical. Tell yourself no too. Things will be okay.
 E: Relationship ended due to poor choices. Keep what's really important in mind. Set limits. Personal care. Importance management.
 F: Make sure you have the time to start the business. Maybe it's not a good fit for you.



Q: Jump to full-time freelancer from moonlighting?
 D: Personal thing. I have support of wife & kids. Remind you of what's important. You need a support network. Okay to tell people you're going dark for a while
 C: My boss made that choice for me. Also personal decision. For me, more stability freelancing.
 B: Big project came along. Decided to do that. Then you learn self-discipline, etc. If cautious, wait for the opportunity.
 D: E-myth Revisited. Working on your business instead of in it.
 C: Leap with confidence & discipline. Keep on going. Finish it and do it well even if it goes over spec.
 A: Save up money. Have something in reserve.



Q: Is hiring people inevitable?
 A: Depends on why you're doing what you're doing. Me, flexibility. I don't plan to hire anyone, but I do refer/outsources. Maybe this will change in a few years.
 B: 2012 single freelancer + network → works well. You can collaborate across the world. Build that network of complementary skills.
 C: I like being a boss
 D: Hiring people for product dev → us. Do what makes you happy
 H: Working with people you like, reliable work.

Notes by: Sacha Chua (@sachac)
 Check out more sketch notes at LivingAnAwesomeLife.com!

WORDCAMP DEVELOPERS TORONTO · DAY 1 · NOV 3, 2012 #WCTO

CREATING YOUR FIRST PLUGIN THE EASY WAY

@thisismyurl
 Christopher Ross 

plug-in: PHP code added to Wordpress



outside the theme, can be shared across multiple sites

`/wp-content/plugins/` or `/` `max one level deep`

Plugin header

```
<?php
/*
Plugin Name:
*/
```

all you need for a plugin to be detected

PLAY NICE WITH OTHER FUNCTIONS!

Unique name: ~~load-css()~~ `yourplugin_load-css()`



ACTIONS

```
add_action('create_category', 'demo_plugin_do_something');
```

event that triggers the action function to call when that happens

See the Wordpress Codex for a list

FILTERS

```
add_filter('the_content', 'demo_do_something');
```

type of content to render function to call

Adding "Settings" link

```
add_filter('plugin_action_links', ...)
```

add a function that returns `$links[]`

Adding options

```
add_action('admin_menu', ...)
```

call `add_options_page` in your function

Internationalization
`_e(...)` → lets you translate to different languages

Adding: Settings options, Settings page, Shortcodes } example

See `fetch-twitter-count-for-wordpress`

How to uninstall
 Check `WP_UNINSTALL_PLUGIN`
 Use `delete_option` to clean up



BEST PRACTICES

- Unique** → names (not `foo`, `yourplugin-foo`)
- Descriptive** → code that's easy to read (not `loop_resume_posts`)
- Consistent** → coding standards
- Be lazy, but smart.** → Look before you code.

COMMUNITY

- Be respectful.
- Fork if necessary.
- Give back. → contributing = more gigs

- Q: Multiuser
 A: mu folder, auto deploy
- Q: Why plugins?
 A: multiple sites, etc.
- Q: Danger using plugins?
 A: Always. Helps to review. wordpress.org often okay other sites → check.
- Q: Plugin interactions?
 A: Yes, conflicting plugins.
- Q: Keeping track of Wordpress updates?
 A: Nightly builds

Q: cleaning up after mess?
 A: check settings API, wp-options. No easy way Try export

Notes by: Sacha Chua (@sachac)
 Check out more sketch notes at LivingAnAwesomeLife.com!

WORDCAMP DEVELOPERS TORONTO · DAY 1 · NOV 3, 2012 #WCTO

CREATING YOUR FIRST PLUGIN THE EASY WAY

@thisismyurl
 Christopher Ross 

plug-in: PHP code added to Wordpress



outside the theme, can be shared across multiple sites

 /wp-content/plugins/ - .php
 or
 / - .php
 max one level deep


Plugin header

```
<?php
/*
Plugin Name:
*/
```

all you need for a plugin to be detected

PLAY NICE WITH OTHER FUNCTIONS!

Unique name:
~~load-css()~~
 yourplugin_load-css()



ACTIONS

```
add_action('create_category', 'demo_plugin_do_something');
```


event that triggers the action function to call when that happens

See the Wordpress Codex for a list

FILTERS


```
add_filter('the_content', 'demo_do_something');
```

type of content to render function to call

 Adding "Settings" link

```
add_filter('plugin_action_links', ...)
```

↳ add a function that returns \$links[]

 Adding options

```
add_action('admin_menu', ...)
```

↳ call add_options_page in your function

Internationalization


_e(...) → lets you translate to different languages

Adding:
 Settings options
 Settings page
 Shortcodes

example

See [fetch-twitter-count-for-wordpress](#)

How to uninstall
 Check WP_UNINSTALL_PLUGIN
 Use delete_option to clean up



BEST PRACTICES

- Unique**
 - ↳ names
 - ↳ ~~font~~
 - ↳ yourplugin-food
- Descriptive**
 - ↳ code that's easy to read
 - ↳ ~~\$X~~ \$loop_resume_posts
- Consistent**
 - ↳ coding standards
- Be lazy, but smart.**
 - ↳ Look before you code.

COMMUNITY

-  Be respectful.
-  Fork if necessary.
-  Give back. → contributing = more gigs

? Q: Multiuser
 A: mu folder, auto deploy

Q: Why plugins?
 A: multiple sites, etc.

Q: Danger using plugins?
 A: Always. Helps to review. wordpress.org often okay other sites → check.

Q: Plugin interactions?
 A: Yes, conflicting plugins.

Q: Keeping track of Wordpress updates?
 A: Nightly builds

Q: cleaning up after mess?
 A: check settings API, wp_options... No easy way Try export

Notes by: Sacha Chua (@sachac)
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INTRO TO THE TEMPLATE HIERARCHY AL DAVIS



The Template Hierarchy



Theme

- index.php } required
- style.css }

what's with all the other files?

- archive.php } overrides
- comments.php }
- ...



- category-slug.php
- category-id.php
- category.php
- archive.php
- index.php

priority for multiple categories?



- single-posttype.php
- single.php
- index.php



- page template.php
- page-slug.php
- page-id.php
- page.php
- index.php



- author-nickname.php
- author-id.php
- author.php
- archive.php
- index.php

FORGOTTEN TEMPLATES

Tags



Taxonomies



Date display



Attachments



404



Post types



Search results



Homepage rule
static → home.php → index.php

When no other template file exists,
WordPress will always display
index.php

- Q: Most interesting thing?
- A: Complex layout with widgets, etc.
- Q: Loop?
- A: Processes posts.
- Q: Custom post types?
- A: (explanation)
- Q: Killing templates?
- A: Haven't tried it.
- Q: Security?
- A: Role, backups, etc.
- Q: Theme vs template?
- A: Templates inside themes
- Q: Theme vs framework?
- A: Framework: foundation of a theme
- Q: Which framework do you like?
- A: None. Bit of a masochist
- Q: Mirror your site?
- A: MAMP/WAMPP/LAMP, then set up your site on your system.
- Q: Favourite plugins?
- A: Google Analytics, Google XML Sitemaps, Yoast, a caching plugin & font replacement (Typekit), Widgetlogic

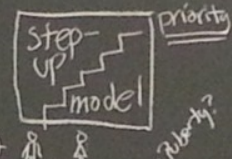
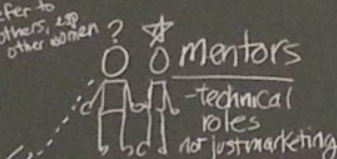
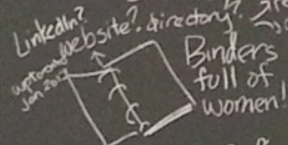
- Q: Calendar plugin?
- A: All-in-One Calendar Plugin with Thenly
- Q: Shortcodes?
- A: Filter

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

UNCONFERENCE: WOMEN IN WORDPRESS

Hosted by: Shannon Smith

Where are the women?



Girls Learning Code

000000
000000
000000
Being the only woman in class

Sacknames for women?

WC Montreal 25% speaking
Shannon 20 coaches and speakers!!!

check Shannon's blog

No other women speakers at #WCTO!

confidence
don't have anything to say to other people

young women need to see

POSITIVE WAYS TO GET MORE WOMEN INVOLVED

↳ Not just for women - diversity!
↳ more pieces to this puzzle

I didn't expect to enjoy web design as much as I did.

Wordpress levels the playing field.

Topic suggestions?
↳ no one uses them!

SUBMIT please!

arena ~~event~~?

Speaking helps your confidence & reputation.

IMPOSTER SYNDROME
↳ guys get that too!

feedback in comfort zone

time constraints? (down arrow)

↳ not an excuse

PRIORITIZING → what's left out?

There's a lot of credit you're not taking.

end user → developer

↳ You can start at a meetup

Notes by Sacha Chua
LivingAnAwesomeLife.com
@sachac

USER CENTRICITY IN WORDPRESS DESIGN

Advocating for user centricity in interaction design



Taylor Dewey

Making stuff that people actually want to use



We publish for humans

PROBLEMS

Assumptions
Need FB & Twitter
Sidebar!
Slider!
They'll like it!

Inconsistency with mental models
1010 ↔ □ .png → ⚙️

Too many options
Oooh, shiny

SIMPLICITY easy to learn understand use

Q&A
Q: Clients who don't know what they want
A: Bill for literature review and recommend.
Q: Wireframing?
A: Clients have a hard time understanding; keep it sketchy or go more hi-fi
Q: In-browser mockups?
A: I don't do as much of that
Q: Backend investment?
A: No good answer; A: educate client

Q: Screenshot for user testing?
A: Silverback, Quicktime, Camtasia... Webcam useful.

- Resources**
- About Face 3
 - The Inmates are Running the Asylum
 - Don't Make Me Think
 - Undercover User Experience Design

I. OBSERVATION

who will use it?
Business/org goals, constraints

Personas
narrative, used to answer questions
Helps you avoid "elastic users" → say yes/no to everything

Interviews

- Background research
interviews → stakeholders, experts, customers, users
Ut. review, etc
background, not design



Competitive audits, evaluation

Usability issue
Severity, scope
Description

Look at their site & provide feedback

Look at several competitors

II. HYPOTHESIS

low-fidelity → high fidelity
scenarios, storyboards, wireframes, prototypes

hybrid approach:
Mockuppress → Keynote template

testable on paper

III. TEST

Do things blow up?
Are we on the right track?

Direct observation pays off
painful, but worth it

Let people be comfortable thinking out loud

I suck.

IV. ITERATE

Focus on stuff that matters.
Doublecheck with your personas.
Don't iterate to death.

- Persona hypothesis
List relevant variables
ex: mobile/desktop...
- Ethnographic interviews
Google for tips
map to variables
team of 2 → drive, notes
on-location → Important! Context
- Construct persona
List variables → Map people → Identify clusters → Beginning bullet points
Check all expectations accounted for → Expand narrative → Prioritize personas map to design

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

WP THEME FRAMEWORKS: SPEED UP YOUR DEVELOPMENT PROCESS



CHAD MOHR



Q: Thesis?

A: Licence controversy, so...

OPTIONS



Install

PICK A THEME & GO

≡ fast start

□ low control/uniqueness



CHILD THEME

□ Tweaking saves time



ROLL YOUR OWN

☹ Serious customization

★ Need to be a master



THEME FRAMEWORKS

↳ customizable theme
↳ parent theme
↳ code/plugin to add to site

BENEFITS

🏠 Foundation

↗ Build proficiency

📄 Collect tricks/snippets (ex: import/export)

💬 Community & support } check before committing!

v2.0 Updates
↳ ease depends on framework

Copy & paste your way to glory!

SOME FRAMEWORKS

➔ Suffusion Theme **FREE** Point & Click

Lots of design options, templates

34 widget areas

See also: Types & Views

Don't Panic

➔ Pagelines \$139 Point & Click

HTML5, Responsive

Drag & drop design

Module store (Hmm...)

➔ Genesis \$70+

☹ child themes

Hooks & filters

Have to learn the Genesis way

Just the code that makes it unique

Great widgets (ex: Featured posts)

➔ Bones Base Theme **FREE**

HTML5 starter-theme

Responsive, Less SASS

Funny comments

➔ Options Framework **FREE**

↳ plugin for option panels



You can also start with child themes of Twenty— & Thematic, etc.



↳ but I've had to deal w/ broken stuff

WooCanvas



↳ interesting?

Foundation by Zurb



Whiteboard

CHOOSING A FRAMEWORK



Match your needs

↳ drag & drop?

↳ building block?



Learning curve, but helpful



Try before you buy (if possible)



Ditch it if necessary



Read reviews check out support

↳ know there are grumpy people



active community? devs? documentation?

Goal:

Build faster & better & smarter.

Slides: switchup.com/theme-frameworks/

Notes by: Sacha Chua (@sachac)

Check out more sketch notes at LivingAnAwesomeLife.com!

FROM ~~WIREFRAME~~ TO WORDPRESS THEME IN ~~10 MINUTES~~

↳ HTML, CSS, images

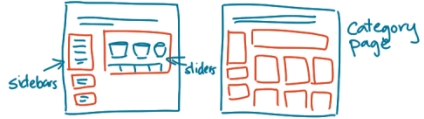
Why develop from the ground up?
Code only what you need
Learning experience
Reputation

HTML, CSS, Javascript
↳ Turn this into a theme

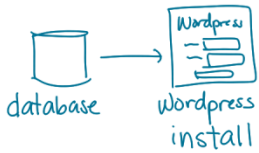
① Save examples of page types



② Identify dynamic regions



③ Set up Wordpress



④ Create index.php & style.css

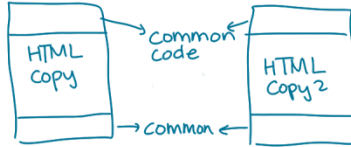
Notepad++ is good on Windows

↳ has name of theme



NetBeans, too

⑤ Split off header.php and footer.php



↳ `<html>`
`<head>`
...
`</head>` } header.php

Copyright, links, etc. } footer.php

Can include more if there are other common elements.

↳ took longer than expected



SAM XU

center

⑥ Add PHP to header:

```
<?php wp_head(); ?>
```

↳ Initializes WordPress engine

⑦ Set up index.php

```
<?php get_header(); ?>
```

↳ paste stuff in here

```
<?php get_footer(); ?>
```



⑧ Add the Loop



```
if (have_posts()):  
    while (have_posts()): the_post();  
        ...  
    endwhile;  
endif;
```

see the Wordpress codex

⑨ Install & activate the theme

↳ wp-content/theme

⑩ Substitute more functions!

the_title(); etc.

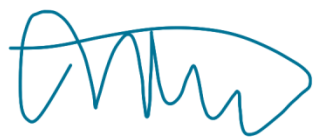
Tips: Install Firebug or use Chrome's Inspect Element
↳ look at stuff
↳ make quick changes

Notes by: Sacha Chua (@sachac)
Check out more sketch notes at LivingAnAwesomeLife.com!

MOBILE APPS IN WORDPRESS VERSION 2.0



TREVOR MILLS @topquarky



The gap between web & native is narrowing.



- 2012 JQuery Mobile v1.0
- ★ Sencha Touch v2.0
- Tons of other frameworks
- Backbone
- Spine
- Angular

Super shortcodes!

```
[the_app sencha="2"]
[app-item post=___] [app-item]
```

```
[the_app sencha="2"]
[app-item-wrapper title="About" icon="time"]
...
[app-item-wrapper]
```

```
[app-posts ...] → like wp_query!
↳ group-by=month grouped=true
```

Adding your own shortcodes

```
add_filter('the_app_factory_init', ___);
```

Shortcode processing:

- 1) Get TheAppFactory instance
- 2) Do stuff

data-callback → read sencha docs
list_template → detail_template



Getting the data

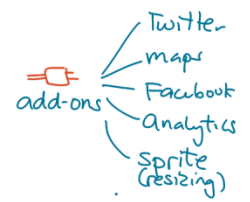
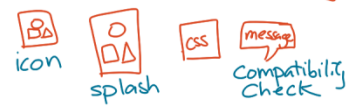
↳ apply map → Joins, group concat



Build

- ↳ puts it into wp-uploads for caching
- ↳ Role-specific version → prod dev

Additional functionality



Client will want a URL for the app
↳ Front page setting

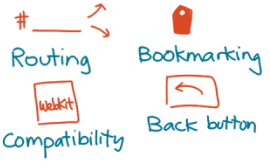
Lots of to-dos!

- SASS
- LocalStorage
- Native
- Documentation, tutorials

Sencha Touch 2.0

Build → Deploy → Native*
Caching, versioning

Introducing WP App Factory

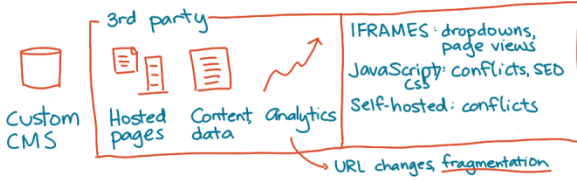


Notes by: Sacha Chua (@sachac)
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WORDCAMP DEVELOPERS TORONTO · DAY2 · NOV 4, 2012 #WCTO @brandondghill
WORDPRESS FOR A LARGE SITE  BRANDON HILL

Brandon Hill

INTEGRATION When you can't just move everything 



Maintaining style
 Legacy content dependencies
 Common navigation
BE ORGANIZED!

No unified search
 Code fragmentation
 Multiple admin settings
 Multiple author/cat/tag pages
 Single sign-on
 Multiple servers/instances
 taxonomies, URLs...

Content delivery networks
 Caching
 Code vetting (wordpress.com)
 Off-hours deploys
 Seamless deploys
 = impossible

TIP: per-host configuration
 functions.php + host.inc.php
 ↓
 load host-specific code.
 TIP: Actions/Filters

There's no plugin for that...
 ... but maybe you can build one.

Powerful tools:

Feeds
 Reduce duplication, supply others
 → IN CUSTOM OUT →
 Multiple inst. Curated Third-party
 3rd party White label White label
 Mobile apps
 [shortcodes]
 Need effective caching!

<XML/> Links
 data → XSL →
 + JSON, too
 Wordpress Bookmarks
 Curated Lists,
 feeds of categories
 created plugin for web form

Appreciate your enemies.

Limitations
 Off-hours deploys ← Procedures checklists
 File-watching tools with CDNs
 Flexibility

Attitude:
 It's possible.
 Check WP capabilities,
 Take notes/Lists,
 Pay attention to releases, plugins

GOALS

- Maximize administer-ability
 ↳ frees up time to improve
- Facilitate 3rd-party integration, revenue
- Minimize content duplication
- Don't repeat yourself
 ↳ minimize code duplication
- Minimize code fragmentation

MIGRATION vs TRANSITION

- Permalink changes
- Multiple sites
- Editorial challenges
- Double-publishing

Administration pages are the heart of Wordpress.
 Make awesome forms.

Notes by: Sacha Chua (@sachac)
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 LivingAnAwesomeLife.com!

WORK IN PROGRESS

Check out sachachua.com for more updates,
or follow me on Twitter at [@sachac](https://twitter.com/sachac)!