

**Charles Byrd**  
**ByrdWord.com**

***“Kill the Chaos” - Charles Byrd is a productivity and technology expert. Through his company, Byrd Word, Charles teaches students how to obliterate time-wasting chaos in their lives through unique processes and tools like Evernote. His vision pursues solutions that allow people to get work done much more efficiently, so they have time to revel in life experiences that are most important.***

**Caitlin:** Well, hey, everybody! Welcome back to the Work-At-Home Summit. I'm here with Charles Byrd, and he is a Silicon Valley veteran with a deep background in technology, marketing, and education. We're really happy to have him on today. He's founded and led multiple enterprise-wide departments at a billion-dollar software company. We're going to get into that a little bit today, but it's even over my head, so we won't go into too much detail about the software and stuff. But he is a public speaker, trainer, and lifelong learner. Charles passionately combines technology and productivity and is a recognized expert in his field. He produces impactful productivity courses teaching and presenting to thousands worldwide. He's also the founder of the company Byrd Word – and as a word nerd, I love Byrd Word, LLC – specializing in productivity training, marketing, and technology to expand his reach. What we're going to be talking about today is a tool called Evernote, and that is basically the workflow that will help you organize your team should you have one. Your team could be your family, so think of it that way as well, especially if you're just starting out. Evernote and just being organized and streamlining your workflow every day will reduce your anxiety and help you impact your business in a positive way. Charles, thanks so much for being here.

**Charles:** Well, thanks so much for having me. I've been looking forward to it.

**Caitlin:** Yeah, yeah. Me too. Excited to have you here because you teach people not only to kill the chaos in your life, but you show entrepreneurs and freelancers – people like me that are kind of a fusion between both the freelancer and entrepreneur – how to have more time in their lives. We have an overlying theme in the Work-At-Home School, Work-At-Home Summit that we can't make more time, and time is your most scarce resource, but we can make the most of the time we have. You can help us feel like we're creating more time by not wasting it, and who doesn't want that? So before we get into how we can do that, I want to know how you got to where you are being this miracle time-maker guy.

**Charles:** Okay. Well, I'll give the summarized version. I spent, as noted, 15 years in the Silicon Valley, and I did project and program management and managed teams and so forth. So I've always been kind of a technology and gadget nerd. I'm always playing with different apps and things like that, just for myself, and then managing big projects and so forth. It forced me to become very efficient with time just to thrive and make those successful endeavors. Then, when I left the Silicon Valley to start my company – because I was reaching about 6,000 people in the enterprise with my trainings and content, and I wanted to make a lot bigger impact. Now we're reaching about a million people a year with our message and training thousands a year.

So, basically, when I was looking at what I could design and start my business around, I really reflected internally on what had helped me the most. I listed out different things that were very beneficial, and at the top of the list was this program called Evernote. And a lot of you have heard of it. Usually, when I'm speaking, 92% of people have heard of it, three-fourths of them already have it, and when I walk up to people at a conference and tell them what I do, their eyes light up. "Oh, Evernote!" Then, this like – I kid you not. It happens over and over. They go, "Oh, I have that, but I know I could be using it better." That happens many, many times a day. So if you do have Evernote sitting on your phone collecting virtual pixel dust, well, you don't actually have Evernote. You have Nevernote. But that's okay because we can coach you on a few ways that you can apply that to really start getting benefit from it.

**Caitlin:** Yeah. I'm one of those people, and I was trying not to laugh because it messes up the audio when I talk over you. So I was trying to hold back, but that is so me. I have Evernote on my computer. I pay for the premium version, and I have it on my phone. I have it on my iPad, and it does come in handy. Like when I need my employer identification number, I just go to the Evernote, and I type in the search, and I have it in a few seconds. Then I have a bunch of business cards scanned in there. I've got the scanner, so last year I started using it, and just to clear the clutter off my desk, that was really helpful. So that's what I really want to talk about. Yeah. Getting that strategy in line, streamlining, how you can be more organized in your work-at-home life. Because there might be some people that are at home right now. They're like, "Well, I don't have a business yet. How can I use Evernote to organize if I don't have a business?" But you can use Evernote for so many different things. It's not just your business, right?

**Charles:** Totally. Totally. In fact, that's one of the main – I think it's a beautiful attribute to this because the skillset is just as useful in your personal life as it is professionally. So whether you're a mom who stays at home looking to get a business going or a full-on corporate professional, the skillsets are just as applicable personally as professionally. I'll just give a couple basic examples. For one, I just got off a partner meeting with one of my friends, and I'm taking notes on that. I have a team member on the call. Next weekend, a bunch of old friends from school, we're all going camping and going to some cave to go check that out. We're looking at campsites and hotels and restaurants, and all that info is getting captured and filtered and tagged into Evernote. So when we leave, all I pull up is one note that says here's where we're staying. Here's where we're eating. Here's everyone's contact info. So, again, personally and professionally, same skillset, massive benefit.

**Caitlin:** Yeah. Absolutely. I just brought up my Evernote. It's on my screen right now, so if you see me looking around, I'm just getting ideas. I have a travel category, but it's largely underused. I think there are two things in there, and I'm clicking on it and it's like – oh, it's just global entry and stuff for – but I should – I hadn't thought about that. I can make a notebook. There's a thing, guys, in Evernote. You can just create a notebook, and it's basically your categories. Then within your notebooks, you can put different notes and you can tag different categories of stuff. We're building a house right now, so I've got a house-stuff Evernote folder or notebook.

**Charles:** Oh, that is massively helpful. We did a remodel, and I'll give you a little overview of the hierarchy of how I use it. But I'll mention in that remodel – which was like nine months, so I can certainly sympathize with what you're working through with building a house – but I had one note where I kept everything in it, documented conversations with contractors – definitely do that! And record those conversations because they might change it later. Anyway, then if we're looking at what doors to use or things like that, I'd make another note where I'm researching all these doors styles and measurements, and then I would link the door note into the master note for that project.

But just as Caitlin's mentioning, you can have notes, notebooks, tags. You can use Evernote on a mobile device. It basically can manage any type of information that you would throw at it. Whether they're physical documents, digital, from the web, emails, anything like that, your own ideas, business cards, pictures, you can capture it all in there. I am a huge proponent of using tags to organize that information. So, Caitlin, we met in Dallas, and this trip I was on, I had a note. I tagged it travel. I tagged it Dallas. We were at a conference, so I used the conference name as a tag. Then for the flight info, I captured that info into Evernote and linked it to that master note. So it said flight info, hotel, people I'm meeting with, all in one simple place, so I kind of had this roadmap to find anything I needed very quickly. And you can integrate it into just about anything you're doing whether it's stuff related to your kids, stuff related to recipes, things related to your business.

**Caitlin:** Pets! I'm looking right here at this big fat folder of my – and a lot of you guys know I have a dog, and I have this whole folder of different things, and I really need to Evernote the heck out of this thing because it's sitting on my desk. But this would be great to have like – you could tag a notebook with pets. Then each pet name would be tagged differently with months and years and – oh, my gosh. My mind is just spinning on how much more I could be using this. So I'm already super inspired to just organize my life.

**Charles:** Yeah. We teach people how to put their finger on anything they need in five seconds which we call your five-second superpower because you can basically pull it up. I've created a course on this, and the idea is spend three hours learning this topic and you'll save three hours a week going forward. One day I added that up. That's 144 hours a year, which is 18 working days, simply by saving three hours a week which is not much. And the truth is it's a lot more than that. I'll also note it's not like you learn this and then go book your month-long vacation. These are little pockets of time rescued throughout your day; reclaimed because you're not sitting hunting for the babysitter's phone number on that napkin that, oh, you left it at your office. Now, instead, you have everything everywhere you go. You just pull it up and off you go.

We also teach tools, workflows, and habits. You could have the best tool in the world. Let's say Evernote is the best tool in the world. Well, it's so flexible, you don't know how to apply it to your business and your life. That's where the workflow side comes in. Then, the habits because you could have the best tools with the best workflows, but if you don't have the habit structure to capture things when they come by your desk – and the way I describe it is when the signed contract comes through from your big client, or your flight itinerary comes in, there's a bell that goes off in your head [bell rings]. I – you think, is this – do I dig it or do I need it? I need this contract. I don't want to lose it, right? That's the bell. Then you save it into Evernote right then.

You can tag it kind of reflecting on the who/what/when/where/why. Like, what is this? Well, it's a contract, so that would be a good tag. Well, who's the client? Well, it's Acme Enterprises, so there's your...

**Caitlin:** Yeah. I just wanted to – sorry to interrupt – I just wanted to know. How easy is it to save something in Evernote?

**Charles:** Super, super-duper easy. Let's say – for example, let's say you're on a website, and you buy something or pay a bill. Then you get that confirmation screen that comes up, right? Evernote has this clipper tool that – it's a plug-in for your browser, and you install it once and log-in once and then it's sitting there, a little cute elephant icon. When you see something you want to capture because the bell goes off in your head – I dig it; I need it – then you simply press that elephant button. You can save the entire webpage. You can save a screenshot of the webpage. If you're on a page with annoying ads down the left and right, but the good content's down the middle, there's a simplified version that will just grab that great blog post article and not the other garbage on the page. Then you can tag it right there. What is this I'm looking at? Well, it's my travel confirmation, so tag it travel. Tag it the city you're going to. Then later when you're like, "Oh, I need that confirmation," you just search for the tag travel or the city Toronto or L.A. or whatever, and it comes right up.

**Caitlin:** Wow. I was just thinking Dallas. I always forget – so I get my flight confirmations, and then I'm like, "Okay. What's my number?" And I have to go to my Gmail, look it up, and it's – I could probably do it in 30 seconds, but being able to do it in 5 by just bringing it up on Evernote sounds like a dream to me. But I think that you're spot on. It has to be about habits. When I get something like that, it can't just be like, "Okay, there's the email. I got it." I feel like Gmail and my Google Docs and stuff becomes like a filing cabinet for me, but it's so not that organized. And the tag – there are no such thing as tags from, as far as I know, within Gmail yet. So just having the tags and the organization of Evernote is really a game changer. I just need to use it better and you're motivating me. So what suggestions do you have for creating those habits and those workflows other than – I mean, the alarm, and then what? You save it, and then how do you get yourself in the habit of using it more?

**Charles:** Okay. Well, for one, you could pick certain – when it comes to habits, there's a queue which triggers a routine, and then you get the reward from doing that routine. So if you and I are having a meeting, that is a queue. We're meeting. There's my queue. The system that triggers from that is, oh, I have a meeting. I will make a new note, and then I'll tag it with your name. Then, if we're talking about, let's say product creation, I would tag it product creation. If we were talking about product launches, I would tag it launches. It's kind of the who/what/when/where/why, so every time you meet with anyone, new note. It becomes like, "Oh, I'm meeting with someone. New note." In fact, we just jumped on this interview. I made a new note. It's just an innate response at this point. You pick something like that that you know is going to happen, and you're like, "Look, I want to just start with that and get in the flow of okay, that's easy enough. Meet with someone, make a new note, not so hard." Then the reward is we could talk next week. We could talk in three months. I can just pull up the tag with your name on it, see any interactions we've had, and just pick up right where we left off.

So it's excellent for relationship-building, for kind of streamlining because you're not re-backtracking to figure out where you left off with people. And folks like you and I, we're interacting with a lot of different people as we run our businesses and lives and our students, thousands of students. So to be able to just pull up one name and see any interaction immediately saves a lot of time. And beyond the time-savings, you just feel good. You have a confidence because you have a system you trust, and it reduces your stress. It's like a winning trifecta because you're reducing your stress while saving time while feeling confident. You're like, "Well, whatever you throw at me, I know I'm going to have a way to handle it."

**Caitlin:** Yeah. I think that's brilliant and as it relates to people starting new businesses, one of the main concerns people have is how can I get clients, and how do I communicate with those clients? And talking about being organized, if you're doing client outreach or say you go to a networking event or a conference and you hand out business cards. You get a lot of business cards, putting all those business cards into Evernote, and then as you reach out to those people, maybe put a copy of the email in your Evernote, and that way whenever you are corresponding to that client, you can just bring it up, like bring up their name. It gives you their business card. You can see all the emails. And they'll be so impressed every time you talk to them when you finally get on that call with them. You can just recall everything that you talked about. The same thing when you're at a conference, getting to Evernote on your phone. Like, hey, we talked about such and such, and tag that. Oh, my gosh, how impressive would that be?

Because the worst thing is, as somebody who does get pitched by freelancers quite a bit, I – so I went from being a freelancer, now I'm an entrepreneur, and I contract with bunches and bunches of freelancers for all kinds of stuff. The worst thing ever is somebody just treating you just like a generic client, like there's no relationship there. But what impresses me is when people are organized. They're on top of it. So I would recommend anybody wanting to reach out to clients in the future, whether it's now or in a week or however long, get Evernote and start organizing your outreach in that way instead of just leaving it in your inbox. I just emailed five people, and then you don't follow up. You can have it tagged by date even, like people I emailed on such and such date. You can just click that, and then – oh my gosh. There are so many different ways that you can be a better freelancer and impress your clients just by being more organized.

**Charles:** It's true and I have a saying I'm a big advocate of. I don't think I created this saying, but I say it enough it feels like I did. "The fortune's in the follow-up." I'll tell you very specifically, these are people I've met probably in the last three months or so, so I go to a lot of events. I probably – I don't know exactly. I probably handed out somewhere between 15 to 30 business cards last weekend, and I can tell you unequivocally, no one follows up. Well, one person followed up because he wants to buy a \$5,000 course I have. One person out of all those people followed up. The fortune's in the follow-up, so if you go out of your way to travel somewhere, go to an event, get their contact info.

One thing you can do, as Caitlin mentioned, with a business card scanner into your phone. You launch Evernote. You hold it over the card, and I frequently do this right in front of the person because it shows them you're taking it seriously. They know the card's not going to get lost in the Uber seat cushions now or stuffed in a purse pocket that you find eight months later, and

you're like, "Oh, I guess that was a missed opportunity." I capture it right there, and then the scanner, using Evernote, it OCRs the text off the card, so you're not entering anything. It just auto-populates it, reading it from the business card. Tags it, you can tag it based on the event. Then, when I'm at a live event – I just did a livestream in my Facebook group a day or two ago on this, about the conference we were just at. I keep one note that I make a shortcut to and any follow-ups because when you're in a social setting like that, you're bouncing from this conversation to that one and 15 minutes later, that one. You're like, "Oh, I'm going to send you this link, and you're going to send me that. Let's set up a meeting." You end up with all these little follow-ups and you're like, "Oh, I'll remember that." You won't. Write it down. Write it down. I had this checklist and when I got home, I had these specific people to follow up with. Since then, Caitlin, people I've met there, I've booked multiple webinars with the people that I met there. Jeff Walker's brother, who was at that event, I have added him to a mastermind that I'm part of. Just following the checklist and the fortune's in the follow-up. That's the entire way I've built my business, and I've grown it from an email list of zero to a year-and-a-half later, 17,000 subscribers, simply by building relationships and following up. So I'm a huge advocate of this because it works. It works really well. Really well.

**Caitlin:** Yeah. 100%, I agree. And the fortune in the follow-up thing just made a light bulb go off in my head. Somebody I'm working with right now, she is a copywriter. We first made contact – gosh, I want to say December of 2016, and about six, seven months later, she followed up and said, "hey." It wasn't a good fit when we first were messaging because she just had a lot of stuff on her plate, and I was like, "Okay. Well, I need somebody now," whatever. But she followed up like six months later and it just so happened I was looking for a copywriter, so she's invoiced me – gosh, like \$15,000 just because she followed up. I mean, it was a small fortune. It's not a stupid amount of money. That's a really significant amount of money all because she followed up, and if she had not followed up, I'd be working with somebody else right now. I can guarantee you. I would never remember that we emailed back and forth. In fact, I probably would have been like, "Oh, well, she's busy. She's probably too busy now, too," and I wouldn't even bother. But because she reached out to me to see what I was up to, she got that work.

And, oh my gosh, there's never been a more true statement. Regardless of how you're feeling right now about Evernote, you guys, like follow-up, fortune, whatever. If you want to waste time and not use Evernote like I'm doing – and I need to be better at it – then at least follow up and use some kind of system that allows you to follow up. I made the mistake of putting all of my business cards in a spreadsheet. Not a terrible idea, but definitely not as good as tagging with the event, scanning the cards as soon as you get them. I know I lost at least one business card while I was at the convention a few weeks ago. So, gosh, there's so much more I could be doing, but I'm disorganized. I shouldn't say I'm disorganized, but I'm excitable. I'm excited I met this person. I cannot concentrate. So I've got to work on that and just being more calm. I don't know. Different issue.

**Charles:** Yeah. Two things there, again, with the fortunes and the follow-up and the business cards because I randomly had lunch with these – I happen to be standing by two other vegan gentlemen, and so we all went to lunch together. And anyway, we're just chatting what we do and this and that. Anyway, as mentioned, this guy really wants to come – I have a live event that I teach relationship-building and joint ventures, and he was like, "Man. That sounds awesome. I

want to go.” So I got an email day before yesterday. He’s like, “I lost your card, but I just found it, and I really want to go to this event.” And I was – yeah, I refrained from pointing out that you don’t lose anything if you put it into Evernote immediately.

Then back on the follow-up, I’m in the productivity space and I enjoy those topics, and I was reading a productivity article by an author. I didn’t know who he was, but I just pinged him. Actually, you probably know him, too. Chris Winfield. I pinged him out of the blue and he did get back to me. It took a while. The cycles between follow-ups were very long, but I just kept in touch week after week, month after month, got him on my show, built a little bit of a relationship there. Then, he’d never done a joint venture and had a big following. He’s a writer for Time, Inc., Entrepreneur, all that. I did a first joint venture with him, talked him through the process. We did really well, did another one with him. Then I did my live event before Traffic and Conversion teaching the joint ventures and relationships. He flew out from New York for that, and at the time, he was like, “The only reason we’re doing all this is because you followed up. I’ve never seen anyone follow up like you’ve followed up.” This was a guy I wasn’t introduced to. He didn’t know anything about me.

So as you’re starting a business or growing and developing a business, this skill set is invaluable. In fact, several of the people on the stage at the event you and I were just at, I’ve been in touch with them for two years, from before I had anything going on in this space. And just went up, introduced myself, chatted. I’ve tried to line up joint ventures with some of them in the past and it felt impossible. They’re up on Mount Olympus, and I’m like, “Hey, guys.” Now, they’re asking for meetings with me or taking meetings when I propose them. Another secret to all of this is constantly providing value. It’s actually nothing about you. It’s about them and how you can help them. And when that’s your focus and it’s from a genuine place, doors fly open for you and next thing you know – like next month, Brian Tracy is – we have a verbal. I can’t wait to see it myself. He’s mailing his 500,000-person list promoting my course, and I’ve read his books from years and years ago. So it’s crazy how fast you can ascend if your focus is on helping others, following up, being consistent.

**Caitlin:** Yeah. Oh, my gosh. I hope you guys are listening to this because he just echoed this thing that I’ve been talking about. Flipping the switch and stop thinking about your own problems, basically. We have a theme that is creating a ripple effect, and the best way to do that is by going deep with your relationships, following up, not just sending one email here, one email there, and how you’re just throwing poop at the wall and seeing what sticks, right? This is not the way that you run a business, but you have to flip the switch away from – and it might feel like, oh, my gosh, the only thing I care about right now is making money and supporting my family. Your clients, the people who pay you do not care about that. They care about their problems, and can you solve my problem? So if you send out a pitch to somebody – and I get pitches like this all the time and, Charles, you probably do, too – from people who are like, “Hey, I need to make \$500 a week. What can I do for you to help me do that?” It’s all about them.

**Charles:** That is an awful pitch.

**Caitlin:** #Barf, right? Just not a big fan of that, so flip the switch and stop thinking about yourself. And it feels counterintuitive and that’s because it is. Humans are innately selfish

creatures, so it's not easy for a lot of us. It takes practice. It definitely wasn't easy for me starting out because I was thinking, "Oh, man. How much can I get out of this client?" – and this, that, and the other, and clients were just numbers. But if you start building relationships and going to events, figuring out where people hang out. If you want to work with writers or bloggers or entrepreneurs or people like Charles, people like me, go find out – go where we hang out. It doesn't even matter if you're doing the same thing that the people are doing at the conference. If you have potential to work with those people, then you should be where they're hanging out, know what problems that they have. That's where you get business ideas. That's where you can make it. We can connect with them as human beings. It's a lot harder to do online. Yes, we have Zoom. Yes, we have the different things that you can – like Skype and stuff like that, but nothing is better than an in-person connection. That doesn't mean that you can't build a business without an in-person connection. Otherwise, nobody would have an online business. But make it about the other people. Go and figure out what their pain points are. Listen to what they have to say, build that relationship. There's really no better way to build a business because that's what business is. It's transactional; it's exchanging value for money and helping people solve problems. I just love that you're on the same page with that. I think that's why we've connected so well.

So I have one more question for you, and that is there are probably some people that are super resistant to getting into Evernote. What would you say is the number one excuse people use for not biting the bullet and spending the time to learn the system?

**Charles:** Okay. I actually think it's a valid excuse that the tool – and I actually, when I first heard of Evernote, this is many years ago and you see these ads. Everyone's running their life and their business and you're like, "Oh, cool," so you download it and you're like, "It makes notes? How are you going to run anything from that?" It did not click and I was just like, "This is dumb." So it just sat there until I was in a VP corporate situation where I gave this monthly presentation, and then I went into the office in San Jose and they're like, "Cool. We're ready for your presentation." I'm like, "Yeah. Next Wednesday." They're like, "No. We need the whole thing in half-an-hour." So I'm like, "Okay," and then I go sit in this office and I'm sweating bullets and my stomach's tense, and I can't find what I need fast enough. It was such a painful experience that I'm like, "This is never going to happen to me again. I will design a system."

So here's – to answer your question, Evernote's so flexible people don't know how and where to apply it, and that's precisely what I teach. So whether people use Evernote every day for certain things and not other things, or they're using Evernote but they're not using tags, or they're totally new to it, I teach people how to apply it to specific life situations systematically with tools, workflows, and habits in mind. It's that power trifecta, the three legs of the milk stool. If you take one away, it falls. I teach how to apply it, and that removes the barrier to entry immediately. You're like, "Oh, okay. Cool. I have a meeting. I make a new note." Anytime there's a – well, I tag it with the name of the person I'm meeting with and the main topics. If there are action items in our chat, I just use the little check box to show it's an action. So at the end of the meeting, I go, "Oh, you're calling me Wednesday. I'm sending you this report. Cool." So basically, we demystify how to apply it to your life and your business, and magically everything gets a lot easier.

**Caitlin:** Yeah. I love it. Well, thank you so much for taking some time to break that down for us. And you guys watching, just to reiterate, our time is the most scarce resource on earth. Another theme that we have within Work-At-Home School is that, exactly. You might be sitting here thinking that money is the most scarce thing in the world, but the reality is that we all have the ability to learn as much as we want. Our brains will never be at capacity, and as a result, we will have an unlimited capacity to earn as much as we want. It's all about the skills. The reality is that we will never be able to get more time. So that's why I'm glad that Charles was here with us today because even though we will never have that unlimited supply of time the way we have with our brain capacity and our earning capacity, working with a tool like Evernote can absolutely help us make better use of the time that we have which will in effect help us make more money. So it's a cyclical thing that we can master that, put in the time to learn these systems, put them in place, become creatures of habit in terms of streamlining our productivity, then it will pay off literally with money which is what we're here to earn more of, right?

So, guys, Charles, he has a free Evernote training for everyone watching the Work-At-Home Summit right now. There's a link for that below this video. If you're a Work-At-Home student enrolled in any level, that's any level, any curriculum package within Work-At-Home School, you will also have access to the first module of Charles' action-packed online course that we were talking about a little bit in the video. It's called Zero-to-60, and you're going to learn to turbocharge the time you save using Evernote. The links for that are below this video as well. Thank you so much for tuning in, guys, and thanks again for being here today, Charles.

**Charles:** My pleasure. Thanks for having me.