Implementation Guide

"Build Your Business Dream Team"

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"Build Your Business Dream Team"

Step #1 - Get Clear on How You're Spending Your Time

I guarantee you are wearing WAY to many hats in your business, which is eating up time that you could be using serving clients and marketing your business. So the first step to building your Dream Team is to get clear on how you're spending your time now. Please check off each of the following items that you are currently personally handling in your business. (Feel free to add to this list.) Once we're clear on that we'll know exactly what tasks and projects can be delegated to members of your team:

Business Administration

- ☐ Managing email accounts (your personal account, your "info" account and any others)
- ☐ Handling incoming phone calls and ensuring questions are answered promptly
- ☐ Setting up new clients (creating welcome packets, setting up in QuickBooks, etc.)
- ☐ Processing incoming mail and sending outgoing mail
- ☐ Coordinate holiday, birthday or other gifts to clients
- ☐ Researching and booking travel arrangements
- ☐ Interviewing new team members
- ☐ Sourcing vendors to provide needed services
- ☐ Training new team members
- ☐ Setting up systems, processes and checklists to manage workflow
- ☐ Managing projects
- ☐ Scheduling appointments and managing your schedule
- ☐ Entering business cards into your database
- ☐ Other: ____
- ☐ Other: ____
- ☐ Other: ____

Accounting

- ☐ Accounts payable (paying vendors, subcontractors, etc.)
- ☐ Account receivable (sending invoicing to clients, depositing checks, following up on bounced or expired credit cards, tracking unpaid invoices)
- ☐ Creating monthly cash flow reports
- ☐ Monitoring profitability by reviewing your income and expenses per product, program or service
- ☐ Other: ____
- ☐ Other: ____

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Marketing

- ☐ Conducting research on statistics, data, or other presentation needs
- ☐ Conducting research on competitors, similar offers, product comparisons
- ☐ Sending email blasts and email newsletters
- ☐ Maintaining your social media profiles
- ☐ Maintaining and updating your website
- ☐ Editing and proofreading articles and other marketing materials
- ☐ Tracking your marketing activities and compiling a monthly report
- ☐ Managing your clients/customer database
- ☐ Collecting testimonials for your products, programs and services
- ☐ Marketing your articles online
- ☐ Screening joint venture opportunities
- ☐ Coordinating joint venture campaigns
- ☐ Executing the details of your marketing plan
- ☐ Sourcing networking opportunities
- ☐ Following up with prospects after networking opportunities
- ☐ Editing audio files
- ☐ Managing pay-per-click campaigns
- ☐ Managing your affiliate program
- ☐ Coordinating direct mail campaigns
- ☐ Creating PowerPoint presentations
- ☐ Other: ______________________________
- ☐ Other: ______________________________

Public Relations

- ☐ Sending press releases
- ☐ Sourcing leads for media opportunities
- ☐ Scheduling media interviews
- ☐ Sourcing leads for speaking opportunities
- ☐ Coordinating speaking engagements
- ☐ Preparing for speaking engagements
- ☐ Following up after speaking engagements
- ☐ Other: ______________________________
- ☐ Other: ______________________________

Product/Program Development & Delivery

- ☐ Maintaining your shopping cart
- ☐ Setting up landing pages
- ☐ Setting up logistics for your teleseminars
- ☐ Setting up logistics for your programs.
- ☐ Coordinating the launch of your products and programs

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- ☐ Creating post-event sales tracking sheet
- ☐ Processing orders from speaking events
- ☐ Creating order forms for speaking engagements
- ☐ Other: ____
- ☐ Other: ____

Customer Service

- ☐ Conduct post-purchase thank you and welcome phone calls
- ☐ Receive and process product returns
- ☐ Staff 800#, website "help chat" or other customer service numbers
- ☐ Answer routine questions for new team members
- ☐ Answer routine questions for new clients and customers
- ☐ Other: ____

Personal Assistance

- ☐ Appointment scheduling and calendar management
- ☐ Drop off/pick-up dry cleaning
- ☐ Check business mailbox & sort mail
- ☐ Photocopy checks & deposit at local bank
- ☐ Minor shopping trips
- ☐ Washing car
- ☐ Filling gas tank in car
- ☐ Random errands & research
- ☐ Return things to the store
- ☐ Occasional Costco runs
- ☐ Preparing for guests or parties
- ☐ Maintain files for bills, invoices, receipts, documents, etc.
- ☐ Scanning of documents and shredding
- ☐ Preparing for client meetings
- ☐ Preparing for speaking engagements
- ☐ Book travel arrangements and organizing travel itineraries
- ☐ Preparing for travel (travel checklist, packing)
- ☐ Tidy up office once per week
- ☐ Receipt sorting/filing (preparing files for bookkeeper)
- ☐ Internet research
- ☐ Maintain operations manual
- ☐ Purchasing gifts
- ☐ Sending packages
- ☐ Other: ____
- ☐ Other: ____
- ☐ Other: ____
- ☐ Other: ____
- ☐ Other: ____

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Step #2 - Determine Your Budget for your Dream Team

Many of my clients initially struggle with this piece of the process because they feel they simply can't afford to hire help in their business. But as we discussed during the training call, you can't afford NOT to outsource tasks and projects that are not part of your core brilliance. Not outsourcing the right tasks is actually costing you more money than you may think, especially in lost opportunities.

Keep in mind, initially your Dream Team may consist of one or two members initially, with you adding additional support as you increase your income and reinvest back into your business.

Following are typically fee structures you can expect to pay for different types of support in your business:

- General Administrative Virtual Assistants - $25 - $40/hour
- Executive Virtual Assistants - $40 - $70/hour
- Specialty Virtual Assistant (Social Media, Online Marketing, Authors' Assistant) - $40 - $100/hour
- Personal Assistant - $25 - $50/hour
- Bookkeeper - $35 - $50/hour
- CPA - $50 - $80/hour
- (Advanced) Online Marketing Assistant - $40 - $75/hour
- (Basic) Marketing Assistant - $15 - $30/hour
- PR Consultant - $75 - $100/hour
- Graphic Design - $50 - $125/hour

If your budget is limited, start by focusing on the position that is going to create the most free time in your day/week. In this way, you'll immediately have more time to work on marketing and generating revenue and the support person you hire will more than pay for themselves.

* Be sure to ask the service provider if they offer any packages or discounts. **But do NOT try to negotiate their fees**. Just as you expect your clients to honor your fee structure, you must provide that same respect to those professionals who work with you.

My Outsourcing Budget		
Role	*Budget*	*Expected Hire Date*

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Step #3 - Create a Job Description for Each Position You Want to Fill

Outlining the skill set and other requirements you need for each person on your team will make it easier for you to review possible candidates and lead to a much quicker decision on your part. It's important to be clear and thorough in your description so as to attract appropriate candidates and avoid misunderstandings down the line.

Following is the job description I created when I was looking to hire a Personal Assistant. You can model this for each of the positions you need to fill for your own Dream Team.

Personal Assistant Needed for Busy, Local CEO

*** About Me ***

I run a highly successful consulting company from my home-based office in Emeryville, CA. I am fun-loving, easy going, easy to work with and very respectful of my team members. I need a trustworthy, honest, diligent and thorough Assistant who will assist me with day-to-day activities so that I can focus my attention on serving my clients and growing my business. I value open communication and am looking to develop a long-term relationship with someone who will become my "right hand".

*** Job Description ***

- Appointment scheduling and calendar management
- Drop off/pick-up dry cleaning
- Check business mailbox & sort mail
- Photocopy checks & deposit at local bank
- Minor shopping trips
- Random errands & research
- Return things to the store
- Occasional Costco runs
- Preparing for guests or parties
- Maintain files for bills, invoices, receipts, documents, etc.
- Scanning of documents and shredding
- Prepare me for client meetings
- Prepare me for speaking engagements
- Book some travel arrangements and organize travel itineraries
- Prepare for travel (travel checklist, packing)
- Tidy up office once per week
- Business card/data entry
- Receipt sorting/filing
- Internet research
- Maintain operations manual

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*** Requirements ***

- Proof of legal eligibility to work in the US
- Must be fluent in English and have excellent written command of the language
- Agree to submit to criminal background and credit check; must have no criminal convictions and good credit rating
- Agree to sign confidentiality agreement
- Ability to work effectively/accurately with a minimum of supervision
- Must have own computer with Internet access
- Must be technically savvy and comfortable with Internet research, Word and Excel
- Ability to work discreetly and maintain confidentiality
- Must have reliable car and valid CA Drivers License
- Willing & able to come to Emeryville & travel around East Bay
- Available 5-10 hours per week
- Strong attention to detail and well-organized
- Excellent communication skills
- Mature and responsible
- Ability to interact with all levels of people
- Strong sense of discretion and personal integrity
- Proactive, diligent, trustworthy, honest and punctual
- Minimum 2-years experience as a Personal Assistant, Administrative Assistant or Executive Assistant
- Previous professional references of satisfied clients and/or employers
- Interested in part-time, long-term relationship (Please do not apply if you are not available for a long-term commitment.)
- Willing to work as an Independent Contractor

*** Other Information ***

Obviously the errands and such will need to be done in person, but most of the other tasks can be done during the week at your convenience from your private computer and telephone line. You will be required to submit a weekly report detailing the time you spend on projects/tasks so that I stay up-to-date on the status of your work. Also, so that we work together efficiently, we will communicate primarily (regarding tasks) via an easy-to-use online project management system.

*** Next Steps ***

If you are a friendly, enthusiastic person who is interested in working with a growing company in a flexible and friendly work environment, please submit your resume with a cover letter introducing yourself, why you are interested in the position and why you would be a GREAT fit. Please include three references. (Responses without references will not be considered). NOTE: References will NOT be contacted without your prior permission.

Thank you and I look forward to hearing from you!

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Step #4 - Connect With Possible Candidates

Now that you are clear on what type of support you need an how much you will spend, it's time to start reaching out to find candidates to interview. Following are a number of suggestions to consider:

1. Ask friends and colleagues for referrals - Be specific about what you're looking for and look for recommendations that your contacts have actually utilized for a length of time.
2. Submit a request via the AssistU registry - Visit http://www.assistu.com/client/registry.shtml to submit your request for assistance. In return, you'll receive responses from qualified VAs who can help with your specific needs. You may also consider working directly with Stacy Brice, the founder of AssistU, to help you through the selection process. This option is available with the Gold service - http://www.assistu.com/client/registry_stacy.shtml.
3. Review the list of candidates at VA Classroom - http://www.vaclassroom.com/rfp.aspx VA Classroom trains VAs to acquire specific marketing skills that can significantly help your business.
4. Review resumes on Craiglist.com (http://www.craigslist.org/) - Many talented professionals post their resumes on Craigslist and you may just find the exact resource you're looking for. I do NOT recommend posting an ad as you'll be inundated with inquiries and will likely find it too overwhelming to proceed. The better option is to click on nearest major city to you, scroll to the bottom of the home page and click on "resumes". There you can search for the type of support you need and connect with candidates from there.
5. Review resumes on LinkedIn (http://www.linkedin.com/)- I actually found my Personal Assistant by using the Advanced Search option on LinkedIn and have been very pleased with her. Look for a fully completed profile, with a photograph and one that has several recommendations.
6. Search for providers on eLance (http://www.elance.com/) - I have in the past found great resources for small writing and research projects. This could be a helpful resource if you need project based help and aren't quite ready to commit to an ongoing retainer relationship.
7. Search for providers on HireMyMom (http://www.hiremymom.com/)
8. Search for providers on ODesk (http://www.odesk.com/w/) - I have not personally used this resource, but have heard good reviews from colleagues.

Here are a few service providers that I have recommended to clients in the past with good success:

- Social Media - Ana Lucia Novak (W: http://tungle.me/CyberDivaVA)
- Marketing Support - Sharon Broughton (T: (916) 570-2840, E: sharon@savvysharon.com)
- Executive VA / Author's Assistant - Joanne Lehmkuhl (T: (650) 960-3167, E: joanne@virtualmsmoneypenny.com)
- Bookkkeeping - Danielle Bauter (T: (949) 600-6283, E: danielle@checkyourself.biz)
- Graphic Design - Jennifer Bourn (T: (916) 788-1740, E: jennifer@bourncreative.com)

Be sure to tell them I sent you!

Step #5 - Interview Strong Candidates

Once you have narrowed your search down to a few candidates you'll want to request their references (at least three) and schedule an interview.

Following are a list of questions I use when interviewing candidates:

- What is your preferred method of working with clients?
- How much direction do you like a client to give you vs. how much room do you like to have decisions on your own?
- Give me three different instances where you had to make a decision on the client's behalf and the client wasn't available for input.
- How many clients do you typically work with at one time?
- Tell me about a time when you had to juggle multiple client projects and how did you handle that and make sure everything was done in a timely manner?
- What is your process for tracking the time you spend on my projects and providing status updates?
- How will you keep track of projects and tasks?
- Tell me about a client who was unhappy with your service and how did you handle it?
- What days and times are you available to work on my projects?
- When does the clock start?
- How do bill?
- Do you have packages?
- When a mistake is made, how will you handle that?
- How would you handle a disconnect in communication between us? If you aren't able to reach me, what will you do?
- Are you planning to continue in this business for a while? Or this a short term option for you? (Stress that I'm looking for a long-term relationship).
- If I work with you on retainer, what is your process for keeping me abreast of where I'm at with my retainer?
- Are the tasks that I've asked for help with that you are particularly excited about or don't want to do?

Feel free to add your own questions to this list.

Be sure to take detailed notes during the interview and notice the WAY the candidate responds. (HOW he/she responds is JUST as important as the response itself).

If the interview goes well and you want to move forward, let the candidate know that you will be contacting their references and will then be in touch with your decision within 48 hours. Whatever your decision, show the courtesy of letting them know in a timely manner.

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Step #6 - Set Your Staff Up For Success

Once you've decided to hire a particular candidate, call and/or email them to let them know you'd like to move forward in working with them. The two of you will need to connect to decide on a start date and likely they'll have some documentation they'll want you to sign. Of course, you'll have your own welcome packet you want them to sign.

At the very least, your welcome packet should include:

- Independent Contractor Agreement
- Confidentiality Agreement
- A Project Description
- Independent Contractor Info Sheet

You may obtain standard Independent Contractor Agreement and Confidentiality Agreement templates at the following websites:

- http://www.nolo.com/
- http://www.legalzoom.com/

If you would like to have an attorney to create customized templates for your business (which is what I have and recommend), you can obtain affordable services at:

- http://www.legalclub.com/
- http://www.prepaidlegal.com/

The project description can be based on the job description you prepared initially. At this stage of the process it serves to document clearly what you expect from the service provider and what compensation terms you have agreed upon. A copy of my form is attached for your reference.

You'll also want to create an internal file for the staff member that includes

- Their resume (if provided)
- References
- Interview Notes
- Independent Contractor Sheet (A copy of my form is attached for your reference)
- A copy of the documents/agreements you signed for them

Going forward, you will add other documents to this file, such as timesheets, invoices, or other related correspondence. You can choose whether to maintain this file online or offline.

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Following is a copy of my new team member setup checklist that you can model for your own purposes:

- Decide on candidate
- Extend offer
  - Determine start date
  - Confirm business address, company name, entity type
- Prepare welcome packet
  - Independent Contractor agreement
  - Confidentiality agreement
  - Project description
  - Info sheet
- Email and request return within 24 hours
- Set up email
- Set up voice mail
- Set them up in your accounting/billing system
- Set them up in your time tracking system (if applicable)
- Set up team member in project management space
- Decide on first tasks
- Assign first tasks
- Send welcome email
  - Email info
  - Voicemail info
  - Share details on team meeting schedule
  - Project management access info
- Provide link to Operations Manual
- Schedule kick-off call - To explain assigned tasks, discuss methodologies, answer questions and get off to a GREAT start!

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Step #7 - Maintain a Strong Productive Relationship

Maintaining a strong relationship with your support staff is the key to getting the greatest return on your investment.

Here are a few things to keep in mind as you move forward:

1. **Be clear with your requests!** - I often hear clients complaining that the service provider they hired didn't deliver what they asked. While this may be true on some level, it's also important to realize that if you don't clearly articulate what you want and what you need in the first place, it's going to be difficult for your staff to deliver that. They aren't mind readers. And especially at the beginning, they will likely need a bit more explanation and "hand holding" as they learn your style. So when making a request, state clearly what it is you are asking for, what results you expect and when you need it by. Also be sure to provide all of the information they need to complete the project/task. Don't be the bottleneck!
2. **Be reasonable in your expectations** - Likely your staff members have other clients that they serve. So they are not likely to be available at your beck and call. If you send a last minute request, they may not be able to respond or assist you. So, be proactive about planning ahead so that you and the staff member can allocate sufficient time to work on your projects.
3. **Treat them as you would want to be treated** - Sounds like the "Golden Rule", right? It is! Treat your staff members as equals. Listen to their suggestions and input. And don't ever talk down to them or otherwise treat them in a demeaning way. It's simply bad practice to do and you'll completely sabotage the relationship.
4. **Pay them on time!** - Assuming there are no issues with the services provided, the staff members invoices should ALWAYS be paid on time, without exception. If an extenuating circumstance causes you to be late, be sure to communicate this and agree on a resolution. (And do not expect them to continue working for you without payment...again that's a BAD business practice).
5. **Show your appreciation!** - Don't take their contributions for granted. Let them know that you appreciate their work and share with them the results that were achieved because of what they did. This will motivate and inspire them to continue providing top-notch services!
6. **Be proactive about handling problems** - If you are feeling frustrated or less than pleased with a team members performance, than schedule a time to calmly discuss it by phone (or in person). The sooner you handle the matter the faster the problem can be corrected an you can move on. Don't allow the situation to fester and don't become overly emotional about it. Mistakes happen and 99.9% of the time they can be corrected. You'll want to clearly articulate what's gone wrong, sticking to the facts without an accusatory tone. Approach the conversation with a positive spirit of wanting to move forward.
7. **Document everything!** - Encourage your team members to document every aspect of their work and add it to your Operations Manual. This will allow them to work more efficiently, which saves them time and saves you money. This will also make it easier to train new team members. And in the event one person is sick or on vacation, another team member can easily step in and take over a task or project.

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A Note From Sydni

Congratulations on obtaining this program! I started my company in 2005 offering marketing support services and today enjoy supporting solo service professionals all around the world to reach their business and marketing goals. What I'm sharing in this program are all the strategies that I have personally used to build my own Dream Team and create a profitable service business.

You'll get the greatest benefit from this information if you start taking action on it...NOW! Don't wait until you've figured out all the details or everything is "perfect". Start at step one, fully implement it and then move on to the next step.

Since I started my company, I've been privileged to worked with hundreds of clients in over 50 different industries to help them create profitable, lifestyle-focused businesses that allow them to serve others. I've designed my coaching and my programs *especially for solo service professionals* just like you who are ready to do the same. My coaching is very implementation focused. It is NOT just a lot of concepts, theories and ideas. It'd definitely NOT a lot of hype and fluff. It's you and me, working together, and my teaching you, holding you accountable and guiding you to the results you desire and deserve.

Most coaches have a particular "style" to their work. Let me be perfectly upfront with you. ***Mine is based on honesty, authenticity and getting you the results you desire as quickly as possible***. I happily share with you everything that has worked for me (and everything that hasn't!) plus all of my expert marketing advice applied to your personal business situation.

You can review the results of some of my clients at:
http://smartsimplemarketing.com/success-stories/

If you aren't seeing the results in your business that you'd like, perhaps I can help. I invite you to participate in a "Profit Breakthrough" strategy session where we can discuss your personal struggles, current goals and create an action plan to achieve them. Contact my Assistant at Info@SmartSimpleMarketing.com to schedule your session today!

I look forward to talking with you!

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