



Training Call Transcript

“Build Your Business Dream Team”



Hosted by
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The Smart Simple Marketing Coach™



Hello. This is Sydni Craig-Hart calling in from Emeryville, California and I want to welcome you to this training call. I am excited to share with you details today on "**Build Your Business Dream Team.**"

This is going to be a really outstanding call because I'm going to teach you everything you need to know, step-by-step, to build your own support team so that you can grow your business, expand your profits and actually be working less than you ever have before.

I find that a lot of my clients and students really benefit from this information because they really struggle with trying to maintain their workload and market their business and serve their clients because they're doing everything on their own. It's been proven time and time again that you just simply can't build a highly successful and profitable business by yourself. If you try, you're going to find yourself burnt out and frustrated in very short order.

So I'm going to share with you today a number of things. We're going to talk about how to find and hire seasoned professionals to handle all of the tasks in your business that you hate or aren't good at. We're going to uncover how to outsource tasks, how to assign responsibilities and how to manage your team and you'll be excited to know that this doesn't mean that you have to hire a single employee. I still do not have any employees in my business other than myself and my business partner.

It doesn't mean that you have to set up a new office space and it doesn't mean that you have to buy a lot of equipment. Instead what we're going to talk about is building a solid team of virtual contractors to support your objectives and to make your life easier. So when you implement these simple strategies you're going to be able to finally focus on strengthening your current income stream generating new revenue ideas and actually working less in your business. So this is actually really, really exciting.

So let's get started. You've often heard me say that one of the keys to success in small business is doing the right things consistently. If you have found it difficult to market yourself consistently in your business or to just run your business in an efficient way it could be for a number of reasons. One reason could be that you're just simply too busy to do all of the marketing consistently yourself.

I know that one of your highest priorities is serving your clients and running your business. So it may be difficult to give the attention to your marketing efforts that you need to unless you find yourself unexpectedly with a few client openings and in need of additional revenue. At that point we are all always interested in doing additional marketing.

Another challenge could be is that you're really brilliant at your thing or your skill, whether you're a graphic designer or a virtual assistant or an acupuncturist or a financial planner, whatever it is. I know that you're really great at what you do but perhaps marketing or even just managing your business is really not your strong suit. Between social media and online marketing and networking and speaking and customer service and billing and a host of other things you have to do, it can



really just be overwhelming for you to wear all the hats at one time, especially if you don't have strong systems in place to keep you on track.

The third challenge I often see my clients facing is that they really want to hire someone but they just don't think that they can afford it. Even if they can afford a small budget for hiring some help they're not really sure what they need and they struggle to delegate, so it just seems easier to "just do it myself". That's what I hear a lot of them saying. There just seems to be a lot of moving parts and they get overwhelmed and confused about where to start.

So today I'm going to share with you my proven solutions to these and other challenges. We're going to talk about today how to find the right support for where your business is at right now. We're going to talk about what qualifications to look for in your dream team. We're going to talk about how much money you should expect to invest in creating this team on a month-to-month basis or even on a project basis if you decide to do it that way.

We're going to talk also about effective delegation to ensure that the things that you ask your team members to do are done well to the level of satisfaction that you need and that you expect from them.

I'm going to talk to you also about how to avoid some of the common mistakes that can be made when you set out to build a team or outsource or bring other people into your business to support you.

So let's first talk about why you even need a "dream team" in the first place and why this is going to make such a huge difference in your business. Today's business market has changed tremendously and if you are going to keep up and continue to find new and innovative ways to serve your clients and to grow your business you're going to need help to do that, especially as it relates to your marketing.

Smart entrepreneurs know that they can't market whenever they need more money or haphazardly or when they get around to it or remember to do so. If you really want to have a thriving, profitable, highly successful business, it's absolutely critical that you market your business on a regular basis, meaning daily, not weekly even, not monthly, but daily. It's really, really important that you do that. That's one of the things that you can outsource most effectively to other people so that they can help you to do this.

Outsourcing and building a dream team also helps you to tap into other expertise regarding marketing and business management. If perhaps, as we talked about a few moments ago, marketing and actually running your business, the day-to-day operations, is something that you struggle with, you probably need some additional help and support to do that.

Outsourcing or building a team or hiring people to come on and help you, people who love bookkeeping and people who love customer service and people who love marketing and all of the

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other things that it takes to run a successful business, they can bring such a fresh energy and a very high level of expertise to your company that you just simply don't have on your own.

You'll often be introduced to fresh ideas about how to market your business, different systems and ways of doing things and just having other people that you can bounce ideas off of and to carry some of the load is going to create a tremendous amount of freedom and free up a lot of mental energy for you.

Another thing that's a great benefit to you outsourcing and creating your team is that it allows you to have an outside perspective on your business. Sometimes we're so close to our business and it's our baby. We invest so much time and energy into making it successful and making it profitable and doing the right things. Sometimes we're really just too close to it to see what we're doing objectively.

What we think may be great or a great program name or a great way to offer a particular service may not be so great from our audience's perspective. Even though you may know your business inside and out and you live it and you breathe and you walk it and you talk it every day, your perspective is really one-sided.

So having your dream team come onboard, different team members who will handle different things and are in a different place in their own lives and their own businesses and just have a different vantage point of what you're doing is really a great way to stay abreast of what's new and current in the marketplace. And really give yourself a well-rounded view of what it is that you're doing or even should be doing in your business.

Having this group kind of on the outside supporting your needs really help you also to be more in tune with what your customers want and need because they'll be hearing feedback. They'll be following up on inquiries. They'll be serving what the client is requesting and they can help you to make adjustments and to make upgrades to what you're doing both in the way you deliver the service and in the type of services you offer in a way that you just simply can't do on your own.

You'll also enjoy other experiences or input from your dream team in terms of what works and what doesn't. This is particularly important when you're doing something new in your business. If you've never tried a particular marketing strategy before or if you have never offered a service in a particular way before you won't really know what works and what doesn't until you get in there and do it.

If you hire the right people who have experience in these areas, in executing a launch campaign, in setting up new technology, in even delivering a service in a different way, you'll find that they can help you avoid a lot of common pitfalls and mistakes that can be made simply because you don't know what you don't know.

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So you can rely on these individuals and their lessons that they've learned and their expertise and work they've done for other people and take advantage of learning from that experience rather than trial and error on your own.

So let's talk about how you can actually create this dream team. There's a number of different ways that you can do this. One option is that you hire several independent contractors. So this is great if you are in a place where you're not ready to hire a full-on staff and you just need to hire certain people for certain things. This way you can kind of piece together your team as you go along and just hire for what you need at the moment.

Now the only downside to that is that your team may not communicate with each other as well as they need to because they're likely at different locations and you would want to create a way for them to be in touch. If you don't they won't be as cohesively connected as you'd like them to be. Also, you'll have a number of different people to manage. So it would be good to start out with one person at a time and bring that person onboard and get them up to speed before you hire the next person.

You could consider hiring a full-time or part-time person internally who is just dedicated to your business, so someone who's not necessarily an independent contractor but who only works with you on what you ask them to do.

You can also consider hiring an already ready-made team of contractors. This is really common and something that a lot of entrepreneurs decide to do. Instead of just hiring the one individual, they hire a team, whether it's a team of VAs or it's some other type of team that's already put together and the members already know how to work together, they already have systems in place, all of the rolls are defined and instead of you hiring one independent person you're hiring a team.

So let's talk about actually how you move forward with this and what steps you need to take in order to create your dream team. There are actually seven steps in my system and we're going to go through them as we continue our conversation today.

So the first step is for you to get clear about how you're spending your time. This is really important because I know that there are things you're doing in your business that you shouldn't be doing, that there's things that are taking up inordinate amounts of time that are frustrating you and not getting done well and just causing you an unnecessary amount of stress.

There's also things that you would like to be doing, things that you just can't seem to wrap your head around or make the time to do because you're so busy in different aspects of your business.

So I really want to encourage you to for the next few weeks to keep track of how you're spending your time during the day. I would start a little notepad or a notebook and just simply write down as you're going throughout the day, served clients or did coaching calls or consulting calls or worked on project, followed up on insurance call, followed up with prospects, spent an hour on Facebook, however you're spending your time I really want you to document that and get really, really clear.

I also want you to think about specific tasks that you are spending your time on. You'll see details about this in the implementation guide about all of these different types of things you could be spending your time on. I've covered a number of different things that I personally have delegated and outsourced in my own life and my business, not even just in my business but also in my personal life.

That has been one of the greatest additions to my team within the last year and has also been one of the reasons why I've been able to boost my income so significantly is because I have really systematized and delegated so many things in my personal life, things like picking up and dropping off dry cleaning, checking my business mailbox, getting my car washed and filled up with gas, maintaining my personal filing systems, receipts, etc., preparing receipts for the bookkeeper, preparing myself for travel and for speaking engagements, all of these things that are kind of supplemental to my business but I've been really able to outsource those as well and it's created a nice chunk of time in my day and in my week where I can serve more clients or set up new joint venture opportunities, etc. So this isn't just about how you're spending your time during your business day but also getting really clear about how you're spending your personal time and off-work hours.

So go through the step number one pages and implementation guide in addition to you just writing down how you're spending your time and really get crystal clear on all of the different things that you're doing that could be delegated to someone else.

Now once you're clear on what you're doing with your time and all of the things that you shouldn't be doing and how you can delegate them to others, the next thing is to determine your budget. Now this is an area where I see a lot of people shooting themselves in the foot because they feel like, "I just can't afford it, Sydney. I'm struggling to make ends meet right now or money is really tight and I just can't afford to pay someone else." So I want to just walk you through an example of how not having your dream team is actually costing you a lot of money.

Let's just say for argument's sake that you are charging \$100 an hour in your business. That's a nice round number, so we'll just use that for the sake of our example. So your hourly rate is \$100 an hour. So typically in an eight hour day, if you worked eight hours straight, you could generate \$800 revenue. That's great. You do that five days a week, that's \$4000 for the week and is \$16,000 for the month, etc.

So \$100 an hour -- but let's say you spend three hours doing your email newsletter or you spend two hours on the phone arguing with your insurance company or you are setting up your own hosting for your website or you're researching what some other service provider is doing. Let's just say that you're spending two or three hours on any one of those tasks.

So you just spent three hours -- instead of making \$300 you just lost \$300. Do you see that? So wouldn't it be great if you paid someone \$20, \$25, even \$30 or \$40 an hour -- we'll go with \$25 for



the sake of our example -- to do your research, to do your email newsletter, to call and make the inquiries with your insurance company or to set up the hosting on your website?

Yes, it costs you \$75, \$25 per hour for three hours, but that gives you three hours to serve your clients, to create a product, to do marketing, to create a JV opportunity and you actually just saved yourself still a bunch of money. So if you were able to make \$300 in that same time period but it cost you \$75, you still made \$225 and whatever the project was, you got it done.

So do you see how important this is? Even if you don't think you can afford it there's always a way around outsourcing and getting help for what you need. So I'm going to talk to you a little bit in a moment about the different price points, etc., but I really want you to wrap your head around this.

If you are a person who has already started your team and you have a VA already working with you or a couple of VAs or a designer or whatever it is, think about how you're using that person's time and what you're asking them to do for you. I want you to think about whether you can expand what that person is doing for you and get them to take more off of your plate or perhaps maybe if you even need to bring on an additional person to delegate even more.

Again, going back to our example, how are you spending your time? What are you spending your time on that is taking away from you actually creating more money in your business. It's very important that you embrace this and that you are open to delegating and doing what needs to be done so you can create the money that you want to create.

So typically with different types of individuals that work in your business there's different fee structures that are involved. With a general virtual assistant, entry-level virtual assistants who mostly handle administrative work typically charge anywhere from \$25 to \$40 an hour. More experienced assistants, those who come with a strong corporate background and are used to working with high-level professionals with C-level executives, they typically charge \$40 to \$70 an hour, sometimes more depending on their level of experience.

Virtual assistants -- and I'll go back and explain what a VA is in a moment if you're not familiar with that concept -- but specialty virtual assistants who specialize in doing social media or online marketing or working with authors, etc., they charge anywhere from \$40 to \$100 an hour.

Now a virtual assistant, if you don't know what that is, is typically a woman -- there are a lot of men in the industry but usually it is women and they work from their own home offices with their own equipment, their own software. They're very skilled in what they do typically and they only charge you for the time that they spend on your projects. They really are looking to become your partner in your business. So this isn't a "minion" that you can just push around as you need to, but virtual assistants really want to partner with you. They want to understand the big picture of what it is you're trying to create and your goals and where you're going so that they can be there to support you over the long term.

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So these are long-term collaborative relationships. This isn't like having a temp come in for a few hours or a part-time person or just a contract position but it's someone who is really vested in your business and looking to partner with you over the long term. We'll talk later in our session today about where you can connect with these types of professionals.

So that's one type of person that you would strongly want to consider bringing on to your business. Another type of position that's important to consider is the personal assistant. I mentioned that earlier.

In my particular case I have two VAs that work with me. I also have an entire team that helps me with my own internal marketing and I have a local personal assistant who helps me with things in my personal life. This individual is someone that obviously I trust very much because she comes into my home. She is like my executive assistant in person but she also runs errands. So she drops off and picks up my dry cleaning and takes my car in for maintenance and does my grocery shopping, etc.

The fee range that I have seen typically with personal assistants is anywhere from \$25 to \$50 an hour. You'll also want to consider hiring a bookkeeper if you don't already have one. Most entrepreneurs that I interact with are really not good at bookkeeping. I personally am not that great at it. It's not one of my strong suits.

So keeping your financial records in order, filing your documents on time, keeping your books up to date is really important and can cost you thousands of dollars in the long run if you don't stay on top of it. How do I know that? From experience because I did make a horrible mistake with my bookkeeping the first year or two I was in business and it cost me thousands of dollars to fix. So investing in having a bookkeeper to help you with your finances is really money well spent. Typically that position charges anywhere from \$35 to \$50 an hour.

You'll also want to regularly be in touch with your CPA, the person who does your taxes and helps you file the appropriate documents. That individual usually charges anywhere from \$50 to \$100 an hour depending on their experience and the location, where they are.

You may also want an advanced kind of online marketing assistant, someone who's more of an implementations specialist and somewhat a bit of a strategist just in terms of utilizing the technology and such. That can range anywhere from \$40 to \$100 an hour.

A basic marketing assistant can be anywhere from \$15 to \$30 an hour and you may also look into having a graphic designer available to you readily and even a PR consultant and those fees range anywhere from \$50 to \$125 an hour.

So depending on your budget you would want to outline exactly what you can afford and which type of professional you want to focus your attention on first or, if you already have a few team members in place, what position do you need to hire for next?

Again, looking at the implementation guide, going through step number one will help you do this because actually each of the roles are designated there for you and then now that you know how much each of them typically charges -- there's always ranges and it depends on experience and that person's fee structure -- but you can kind of budget what you can expect to pay and then on the flip side of that look for where you can pull that money from the rest of your business budget.

Now let's say for example that you have no budget, that you really are saying, "Sydni, I really just don't have an extra even \$300 a month to spend on hiring any help." If that's the case with you, I hear you. I very much want to encourage you to look into the resources I've shared, the different types of assistants, the bookkeeper, the PR consultant, etc. But if you really just don't have any budget I would encourage you to look to a school in your area and hire an intern. Interns can be brought on at no cost to you. It gives great experience to the intern and can definitely help you especially with the marketing tasks in your business and even some of the management tasks. It's good experience for them to see how a small business works and know what the day-to-day operations are. So even if none of these positions fit into your budget there is still a way to get help with what's sucking up your time in your business by hiring an intern and connecting with a college in your area can help you to do that. You'll want to connect with the internship or the career office at the school closest to you or even a couple of schools.

Once you have gotten clear on what exactly you need this person to do, step number two is to determine your budget. Step number three is to move forward with filling that position so you'll want to create a really detailed job description for the position as you want to fill it. Now this is really important because the clearer you are, the easier it's going to be for you to attract the person that you want to hire. If you aren't clear, if you aren't really sure what you need them to do, if you don't know what the requirements are, if you don't know what you're going to pay them, it's going to make this process much more drawn out and frustrating for you and you're not hardly going to attract the qualified candidates that you want to attract.

I really want to encourage you to create a job description for each position, even though this is not an employee, employer situation, you're not hiring them to work for you. You are wanting to be really clear and specific in terms of what you expect and what you need them to do.

So to assist you with this I have actually given you a job description for when I hired my personal assistant. This is literally what I use to source leads and to find candidates to fill this position. You'll notice there that I gave a little bit of information about myself. I talked about the type of business I have and what I was looking for.

You want to do that. You want to feel relatable and approachable like you're a person who's easy to work with. So it's not just about what the person's bringing to the table. Talk about who you are and what some of your goals are and what it is that you're doing and why you need this support. Give really clear details of what you want the person to do. So go back to your checklist in step number one, look at your notepad from where you've kept records of how you're spending your time and just outline very detailed what exactly you need this person to do. There shouldn't be any ambiguity in the job description. You want it to be crystal clear.

You also want to be really clear with the requirements of the position. So you'll see that mine was very detailed because, again, this is a very personal relationship, this person that I'm inviting into my personal life. So I had a lot of requirements. Perhaps depending on the position that you're hiring for you may not need all of this but whatever you require of the individual in terms of background or wanting to sign agreements or what have you, you'll want to spell that out.

So if they feel comfortable with that they can move forward and if that's not comfortable for them then they won't be interested. So this will actually help weed out people who aren't really a good fit and save you the time of setting up interviews and reviewing resumes or references, etc.

You want to tell the person exactly what you want them to do to apply for the position. So if it's submitting a writing sample, if it's a resume, if it's showing you their portfolio, if it's giving you references, whatever it is you want to spell that out clearly. So take the time to write this out and don't hesitate to put exactly what you want.

This is really important that you hire the people that you want to hire upfront and that you're really clear about what you need and the clearer you are the easier it is going to be to find them. So put some time into this. This is actually probably one of the most important pieces of the process is that you are really clear and that you document this for the individuals who are going to be considering submitting their interest in this position.

Now step number four is to connect with possible candidates. You want to find where these individuals are possibly hanging out or living so that you can present this opportunity and invite them to express their interest.

There are a number of different places where you can find really high-quality leads for building your dream team. So the first place that I always like to look is to ask friends and colleagues for referrals. Especially in this small business or solopreneur market, a lot of us are needing the same types of services in our businesses.

So it's fair to say that other individuals in your town, other colleagues in your field have at one point or another wanted to hire for one of these positions that you're looking to hire for. So reach out and ask them but be very specific about what you're looking for. Don't just say, "Oh, I need a support person," or, "Oh, I need a VA." Be really clear. "I need a person to help me with these specific things. Do you know of anyone?"

Look for recommendations that those in your network have actually worked with. Sometimes individuals refer people that they just have heard of or they saw their website or they met them at a networking event and a lot of times that's fine. But it's even better to get a referral or recommendation for someone that has actually worked with someone that you know.

So look for those types of recommendations. "Oh, yes, I've been working with this bookkeeper for two or three years and she's great and she's honest." That's a great referral. A VA who has been



working with one of your colleagues or a friend of yours for 1.5 years, that's a great referral because there's solid experience there to back that up.

Another place you can look for virtual assistants in particular is via [AssistU](#) and that's A-S-S-I-S-T-U.com. I actually was a virtual assistant when I first started my company many years ago actually now and I thoroughly enjoyed the program. It trained me extensively in terms of how to run my business properly. So you can find really high-qualified leads actually at [AssistU](#) and I have provided the link for that in the implementation guide.

If you're looking for support specifically with your marketing, which I'm sure in some point in time you will be, you would want to check out the [VA Classroom](#) which is a training company for virtual assistants to train them particularly on various online marketing strategies like social media, email marketing, video marketing, podcasting, etc., blogging. They have all kinds of wonderful programs where they teach these virtual assistants how to specialize in these particular types of services.

There's a very extensive training process and they have to take a test and it's pretty well rounded. So you would do well if you're looking for support with marketing to check out the list of VAs who list their skills and their availability at [VA Classroom](#). Again, you'll find all of the links to these in the implementation guide, so don't worry if you aren't catching all of these names right away.

Another place that you can often find really high-quality candidates to become members of your dream team is on [Craigslist](#). If you're not familiar with Craigslist it's an online basically classified service with websites for almost every major country in the world where individuals can buy, sell, rent, own, you can actually live your life on [Craigslist](#). I personally have. I've rented apartments and sold things and found cars and done all kinds of cool things on [Craigslist](#).

But I've also on a number of cases seen resumes for really highly-qualified candidates. So a lot of times you'll find that individuals, especially in today's economy, are looking for opportunities and they're posting their resumes and these are not just people at the bottom of the totem poll. These are individuals with really high level qualifications, extensive experience and a great background to support you in doing what you need to do.

Now there's also a section on [Craigslist](#) where you can post an ad for -- you post your job description, basically, and post an ad for the job. I do not recommend that you do that. I actually did that a few years ago when I was looking to bring on my first team member and was completely inundated with interest, more than I could have ever followed up with.

A lot of the leads really weren't very high-quality and it took a lot of time to sort through them and the whole process just became really overwhelming. So I don't recommend that you post your job description or an ad for an open position on [Craigslist](#). Rather you want to go to where professionals post their resumes and you do a search and scan the resumes for the positions that you're looking to hire for. It's a much better use of your time and it'll just be much easier for you to manage that way.

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Now another place you can find great leads is on [LinkedIn](#). [LinkedIn](#) is a social network, if you're not familiar with it, and it's basically a place where individuals can create an online resume and they can have recommendations from people that they've served or worked with or companies they've worked with and really allows you to see a very well-rounded picture of a person's background.

You can do a very extensive advanced search there and you may likely find your next team member on [LinkedIn](#). That's actually exactly how I found my personal assistant was via LinkedIn. I really liked her resume. She had a great head shot there.

You really want to look for that. Look for someone who has completely filled out their profile, so no half-stepping there. You want someone who's taken their profile there very serious, who has a really nice, professional head shot and who has experience in the areas that you're looking to get support in, so definitely recommend [LinkedIn](#) as a great resource.

You can also look on [eLance](#). I've had really great success with finding a few providers on [eLance](#), especially when it comes to doing research or doing minor tasks, marketing related, developing, copy and that kind of thing. You can often find a lot of really great resources on [eLance](#).

There's a wide range of fees. [eLance](#) is well set up to handle the whole process from start to finish from you creating the opportunity to the person proposing their bid and they handle the money and the escrow and all of that. It's a really user friendly system both for you and the person that you are looking to hire. So I definitely recommend [eLance](#).

In the past I have also found good leads for support candidates for my dream team at [hiremymom.com](#). Again, this is a place where you'll find many, many service providers who often have a strong corporate background, who have really well-established qualifications and can be great resources and service consultants and strategists for different areas of your business. So that's [hiremymom.com](#).

Then one resource that I wanted to share with you but that I will say I have not personally used is called [oDesk.com](#). I know a number of my colleagues use providers on [oDesk](#). Many times they're overseas and they have found good success there.

Again, I haven't personally had the experience with it, so you'll have to kind of do your own research and see if you see any good candidates there but it is a resource that's been mentioned to me a few times, so I wanted to share that with you.

In the learning guide I also have provided contact information for a number of providers who I have personally worked with. So, again, the first area we talked about was getting referrals from friends and colleagues. So I've given you referrals for a number of different leads where you can -- or resources, rather, where you can find really great support.



So once you have reached out and fielded some of these leads and you've sent out feelers and posted your job description, you're going to start getting people who reply and are really interested in talking with you about the opportunity, so your next step, step number five, is to interview the candidate.

This is actually, again, a really critical piece of the process. You really want to interview your possible dream team members really well. Before we talk about what you ask and how you handle this process, let me tell you why.

I actually -- the personal assistant that I have now is actually the second person I have had in that role. I made the mistake initially of not doing as thorough of a job interviewing the first person who worked with me because I really liked this person and they seemed credible and seemed like they could do a great job.

Had I interviewed this person more I would have seen some red flags and I probably would not have hired them. So I really want to encourage you to save yourself a lot of stress and money and headache in the long run by having a strong interview process and following that. Don't just hire someone because they have a great smile or because they say they can do a certain thing or because the two of you just hit it off. That's actually partly important but it's more important that the person is well established and has credible references and can really back up what they claim they can do. You doing a thorough job of interviewing them will help you to identify that.

So in the implementation guide, I have given you a list of questions that I typically use when interviewing candidates. Now, obviously, depending on the position that I'm looking to fill there's different questions that I'm doing to ask. If I'm looking to hire some type of design professional I'm going to want to see the different types of portfolios that they have or the projects they've worked on or know what types of software they're familiar with, etc.

When I was hiring the personal assistant, those questions were a bit different than when I was hiring a virtual assistant. So these questions will vary depending on the type of person that you're looking to hire but nonetheless you really want to do an extensive job of interviewing them.

You absolutely want to check references. So I would not recommend hiring anyone that doesn't have references that you can check and have good conversations with the references as well. Ask them what they have enjoyed about working with the person and what they don't enjoy. Ask them about a time when things went wrong and how the candidate handled that. Ask them if they had to do it over again would they hire this person. Sometimes people stay with a provider just because it's comfortable and they don't want to change but if they had to do it over again wouldn't really hire that person. So you want to pay attention to the way the reference answers the questions.

Of course, if the candidate has provided the individual as a reference they're going to say really great things about them otherwise why would you offer them up as a reference? But you still want to pay attention to the way the person answers the question. Are they hesitant? Are they unsure of their answer? Do they stumble over their words?

That may be an indication that there's something there under the surface. This holds true too when you're interviewing the candidate. Pay attention to the way they answer. Now the person may be a bit nervous and that's understandable. Any time you're in an interview situation it can be a little nerve wracking. But you still want to pay attention to how they answer and is there conflicting information.

Do they really have the evidence to back up what they say they can do and the way they're answering those questions? So make sure that you ask all of your questions and feel really comfortable and confident about the answers that are given to you and really think about the interview after it's concluded so you can see how you feel and if the person may be a good fit for your team.

Now once you've gone through the interview process and narrowed down who it is that you want to consider hiring, you want to give yourself a day or two to make a decision, definitely check their references and then you want to go ahead and extend the offer.

So this isn't like the corporate world. We don't have to put together a whole offer letter and get them to sign it, etc. But you do want to call the person up and let them know, "Hey, I really enjoyed our conversation. I have checked your references. They check great. I'd like to invite you to come and join my team," and then you go through the details of what that looks like.

You'll want to determine a start date and get clear on what the financial terms are, etc. Now a couple of things to keep in mind at this point, (a) please do not try to negotiate the person's rate. It's very important that you don't do that for a number of reasons. First of all, whatever your established rate is in your business I am quite confident that you don't appreciate it when people try to whittle you down and undermine what your fee structure is and try to get the great deal. Of course we all want a good deal and we all want to get value for our money but don't undermine the relationship or show disrespect to the other individual's fee structure. They're a business owner just like you. You're not hiring them as an employee and it really sets a bad tone if you try to whittle them down on their rate. That's number one.

Number two, the other individuals that you have interviewed but you have decided not to hire, please go back and tell them that you've decided not to hire them. It's just common courtesy. They'll likely reach out to you and inquire what the status is. So just be proactive on that and close the loop and let you know you appreciated their time but you've decided to select another candidate and you really don't need to say any more than that.

Then you want to get really excited about the person you have decided to hire. Likely they'll say yes and then the two of you can work through the logistics of how and when they'll start with you.

So step number six is setting your team members or your staff members up for success. You'll want to prepare the documentation that needs to be in place before this person starts working with you. Do not skip this step. If the individual you are hiring has documentation that they want you to fill



out, accept that, fill it out and return it promptly but you need to have documentation that clearly spells out the terms of how the two of you will work together.

At the very least, this can include an independent contractor agreement or sometimes called a subcontractor agreement. If that agreement does not have a strong confidentiality clause in it you'll want to have them sign a separate confidentiality agreement.

You'll also want to include a description of what exactly they're going to be doing for you. So this can be pulled from the job description that you created initially and just really clearly state these are the types of tasks that will be expected of you, this the start date, this is the hourly rate or the retainer fee, this is the expected start date, etc.

Then you'll want to collect an information sheet which basically just has details on the person and their address and where you should send their invoices to, etc. So you just want to capture all of this information in one place so that you can have it handy in their file.

I do recommend that you have an agreement created for your company. I've given you a couple of resources in the implementation guide for templates that you can purchase online and just kind of fill in the blanks. But I really recommend that you consult with an attorney and have customized documents created for your business.

Depending on the area where you live or what type of business you're in or what your personal preferences and needs are, just a standard, run-of-the-mill agreement may not cover what you really want. Getting these agreements drafted is much less expensive than you think and you can use them over the long term. So you may want to check with [The Legal Club of America](#), is one service, or [Prepaid Legal](#). Both of these are kind of HMO plans for legal services where you pay a small fee each month, maybe \$60 to \$75 and then you get access to a wide range of legal services and attorneys.

There's often things included like document review, one or two initial consultations per month. They can help you with collections. There's a whole host of services that are included but at a fraction of the cost of what it would cost you to hire your own staff to be on retainer to you.

So I really, really recommend that you do that, that you consult with an attorney in your area who is familiar with the regulations and guidelines that your municipality enforces and get them to draft customized documents for your type of business and to cover your concerns and to make sure that the agreements protect your interests. So after you get all this in place you'll want to have the person sign these documents before they start. Do not get into a situation where you're having them start to work on your business or on projects for you and all of this legal paperwork isn't in place.

It can be very tempting to do that, especially when you're excited and you have a really good feeling about the person but it's really not a good business decision for you to do that. So I really encourage you to give yourself a couple of weeks to get all of these details straightened out before



the person starts. Don't hire them just in a frenzy or in a hurry because you'll want to go through this process slowly and make sure that all of the Ts are crossed and the Is are dotted.

The next phase of getting them set up is to get them set up in your company. Now I've given you a checklist that will help you to do this. This is actually the checklist I follow when I bring on new team members and this often involves setting them off with a private email address for your company, perhaps a voicemail box, getting them set up in your invoicing system so that you can pay their invoices on time, giving them access to your project management system and letting them get access to the first types of tasks that you're going to ask them to participate in, which leads to the next item, which is setting up a system to the two of you can communicate.

I really do not recommend that you work with your dream team members by email. It's just going to be time consuming and labor intensive and it can get very confusing and convoluted very, very quickly.

It will be far better for you to have some type of project management system in place so that you can work with these individuals in a streamlined way and keep your tasks, requests and documents and information and such very, very organized. So the two systems that I recommend are [Base Camp](#) and [Central Desktop](#). I will give you links to both of those as well but both of these will allow you to set up project spaces for each individual team member or per project or per program, however you want to work it.

But this allows this to be the central place where you share information and where you communicate. Especially as you're looking to grow your team quickly you would want to have all of this information centralized. The information that your contractors or your team members work on should not just live on their computer without you having access to it and vice versa. If you're needing them to do things for you, you want to make it easy for them to access the information that they need to do so. Both of these systems will allow you to do that quickly and easily.

Now step number seven is to maintain a strong and productive relationship with your dream team. This is really important. I really want to talk about this in depth because while it's true that in some cases you just may hire the wrong person or they don't quite have the skill set you need or they're not experienced, etc., a lot of times the problems in the relationship start with you as the client or the business owner.

We don't often like to hear that. We don't like to often be told that we're the problem child or that it's our responsibility, but it's true and I've seen it over and over again both in my role now as a coach and consultant but also when I was a virtual assistant.

So I really want to make sure you're clear about how to have strong relationships with your team members. You taking the lead and setting the tone and creating a really great working environment will go a long way toward you creating profitable relationships with these individuals and toward them really contributing in the way you want them to in your business.

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So the first thing to keep in mind is to be really clear with your requests. If you don't clearly articulate what you need and how you want it done and when you need it by you can't expect the person you're asking for help from to have ESP and to know all of that automatically, especially at the beginning of a new relationship. So you need to be really clear.

"Jane, can you help me with this, this and that. Here's the information you need to complete the tasks and I need it done by this date. Can you help me with this, yes or no?" Be crystal clear. Don't leave it up to them to figure it out, especially when you're starting out with a new team member.

Yes, you may know your business like the back of your hand and you know where everything is but they don't know that. So you need to invest the time to get them up to speed and don't hesitate to answer questions and don't be stingy with information and resources. Be really, really clear about what you need and especially the deadline you need it by.

Understand that likely you'll be hiring individuals who have other clients and have other things going on. They don't just work for you. So they have to prioritize your tasks and if you don't say, "Hey, I need this by Thursday. Can you get this back to me," then they're not going to know that and they'll just get it done as they get it done. So be really, really clear about all of the details of your request.

Further to that, you want to be reasonable in your expectations and this is something I've had to learn even with the team members that I have on my staff now. Sometimes we wait until the last minute to do things and then we want everyone to stop what they're doing and jump through hoops to create the results for us and, really, that's not a great way to do business and it's not a good way to interact with our team members.

Likely your staff members will have other clients that they serve, so they're not really going to be available at your beckon call. So if you email your assistant on Friday at 4:00 you shouldn't be alarmed if she says, "I can't get to this until Monday." It's not fair to expect her to cut into her nights and weekends to work on something because you've waited until the last minute.

So be proactive about planning ahead so that you and your staff members or your dream team can allocate sufficient time to work on your projects. If you know you have a program or product launch coming up in two months or in a month then let them know that ahead of time so that they can start preparing.

If you know you're doing a speaking engagement in two weeks, ask for help ahead of time to get your materials together and make the confirmation calls, etc. You want to really get into the habit of being proactive and being prepared and sharing information ahead of time so that your dream team can support you and things aren't scrambled and being done at the last minute.

Another thing to keep in mind is really just the Golden Rule and that's to treat your team members as you would want to be treated. Treat them like equals. They are business owners too. You've

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asked them to join your team because they have specific skills and expertise that can contribute to your success as a business owner.

So treat them as you would want your clients to treat you. Don't talk down to them. Don't be demeaning. Don't minimize their contributions and don't try and encroach on their boundaries. But just really treat them well as individuals and respect the fact that they're business owners and that they have a place in your business but that you don't own them and that they don't really work for you.

The next point to keep in mind is to pay them on time. Just as you appreciate being paid promptly by your clients you want to be a good client too and pay your team members on time.

So when you get the invoice, pay attention to the terms, especially the terms that the two of you agreed upon when you first started working together. It's really important that you honor that agreement because money issues can create a lot of negativity and bad will between you and your dream team. That's just unnecessary and it detracts from the overall success that the two of you could be creating together.

So be a good client. Pay your invoices on time. If you have a situation where you need a bit more time to settle an invoice, communicate that. Don't just expect them to wait for you without communicating but let them know, "Hey, is it okay if I pay this next week instead of -- or the week after instead of next week?" or whatever it is.

If you do have a delay, don't expect them to continue their work for you if you haven't paid them on time. Again, it's just bad business practice and not a great way to interact with your team members. It's just going to cause frustration and resentment which is going to undermine your relationship.

You want to show your appreciation for them. Please don't take their contributions for granted. No relationship is perfect and there will be mistakes that are made. But likely these individuals are going to create a lot of great results for you and your business.

So be generous with thank yous. Be courteous and say please. Show your appreciation for them and what they bring to the table and let them know how their efforts are making a difference for you.

Be proactive, too, about handling problems. Again, as I just stated, no relationship is perfect. They will make a mistake just like you will make a mistake. So don't be overly alarmed. Likely no small child will be harmed because your ezine didn't go out on time. So keep the mistakes when they're made in perspective but also be proactive about handling problems.

If there's a serious problem then step up and address it. Maybe it's not a deal breaker or it could be grounds for terminating the relationship but do put forth some effort to try and resolve the problems when they arrive as they arrive. Don't let things fester and allow yourself to become overly frustrated. It's just going to, again, create negative energy that's difficult for you and the



dream team member. You want to be prompt about handling problems and look for ways to move forward past them and create solutions so that the problems can be avoided in the future.

Perhaps the most important thing to do in maintaining a productive relationship with your dream team is to document everything. You really want to work on creating an operations manual for your business so that all of the passwords and links and access information and procedures and checklists, etc., live in one central location that can be accessed by all members of the team when they need it.

This is really important because people do go on vacation and occasionally we do, unfortunately get sick or for whatever reason you and one of your team members may decide to part company. If that's the case, you don't want all of that information walking away with them or not being accessible to you because you don't have it documented.

So really insist that everything that's done in your business by your dream team members be documented and that your operations manual is updated regularly. I suggest that you have one person designated to review the manual on a monthly basis, update passwords, update links, update new steps, etc., so that your manual is always, always up to date and this will just save you so much time and money in the long run. Especially as you bring on new team members they'll be able to quickly get up to speed and be able to jump right in and handle the roles effectively and efficiently.

So we've covered so much great information today. You're so ready and prepared to hire your very own dream team and to start creating even more profitable results with your marketing and in your business.

So just to recap, step number one is to get clear on how you're spending your time. Step number two is to set your budget for your dream team. Step number three is to create a job description for each position you want to fill. Then step number four is to connect with possible candidates via various means that we discussed during that section of the discussion.

You'll want to then, in step number five, interview the candidates. Step number six is to set your staff up for success. Then step number seven is to really work towards maintaining strong productive relationships.

If you do this, if you implement these strategies in your business you will absolutely have a really strong, amazing dream team who will support you and allow you to pursue every goal that you've ever wanted to accomplish in your business.

I encourage you to start taking action on this right away, to look for ways to implement this with the team members you already have if you do already have folks working with you.

It's been great chatting with you and I look forward our next opportunity to talk live and hope that you have a great afternoon. Take care. Bye-bye.