Sink Handle Episode 19 transcript

Hello, everyone, and welcome to Episode 19. So last week, we were talking about client onboarding and how you make a really great first impression and get the right client, make sure that they're suitable that kind of thing. This week, I wanted to take that idea and turn it on the opposite side and talk about team onboarding. We talked a lot here on the podcast about getting help and what that looks like. And for most of us, if we were in a job that did not hire people, we have no idea what that means. the hiring process can be complicated and there's legalities and all that stuff. But I'm going to give you just like a brief kind of lay of the land. If you are in your own business and looking to hire a subcontractor. Each of these steps could be a book, writing a job description. I'm sure there are literally books written about that. So here's your lay of the land. I think that the first place we need to start is a job description. And you're going to "Ugh, I don't know HR department" and you don't need one. job description just means this is what the job entails. That's it. It doesn't mean that you have to go in like crazy corporate HR format, I just need you to put on a piece of paper what you expect this person to do. So that when they look at it, they will know what's expected of them. So there is going to be some job descriptions out there that are crazy. They want seven different people doing one job for $8 an hour, that gives the person looking at this job, the idea of what's expected of them how much you're gonna pay and if you're crazy or not. Because sometimes people want everything. And that's not fair. And I think also the process of writing down what you want is very... not cathartic... but like it makes things clear. What you want, what you need, and then it gives the person some idea of what's expected of them. Right? When they get there. They know what's our handling. They don't they know they're not handling everything. And it also reminds you they're not handling everything. I really think the easiest way to do this is to get it into a system and not just say email me at with your info. No. Send me a resume. No. By the way I could go on a whole rant here about business owners being asked for resumes. I don't ask for resumes. You don't ask your plumber for a resume. You don't ask subcontractors with their own business for a resume. You can ask them for LinkedIn, you can ask them for examples of their work. You can ask them to answer questions you can tell those kind of things. asking them for their resume is a very "employee mindset" thing. You're not hiring an employee. you're hiring another business to do a job that needs to be at the forefront of your thinking. I use Google Forms. You create a form and then it has each question they answer and then it goes into a spreadsheet. And then you can post it where you think and that's a whole nother conversation as well that there's a lot of great Facebook groups if you're looking for a virtual assistant or something like that, that you can post in there. There will be a ton of people that apply for this job. Except that some of them will have no background in this. Some of them will not... well some of them crazy... like you get like the whole shooting match here. I love the fact you can go a Google forms, all the questions that are answered they get filtered through you can have them upload attachments if they need to on there, it's great. You can brand it make pretty and then you can look down the spreadsheet and see if people didn't answer the questions because a lot of people just throw their information in but they won't actually answer the questions. You can just delete them. I was hiring someone for financial stuff on my own team. I needed them to know some stuff like an accountant but just you know, but they were numbers, people kind of thing. I put in a question about expenses or something and it was one of those things that was like Well, obviously That's the answer. It was a really basic finance question, what is an expense or something? And so many people got it wrong way, way easier to weed people out. Anyone who got that question wrong- out. And it really narrowed things down and it was all in a spreadsheet, it could just scan back and forth instead of reading resumes. So then you pick a few, you think they fit, schedule interviews with them, use acuity or kalindi or something like that. So they have a time that they can go pick, and they can schedule you're not going back and forth with them. Try to make this as easy as possible. And you this is supposed to make your life easier, not harder. So you pick a few you do interviews, ask basic questions. These do not have to be seven hour interviews. Most of mine are probably 15 to 20 minutes, depending on how much I like them. The ones I get out, I'm like Oh, Jesus, and that's a whole other conversation about the interviewing process and people showing up in their pajamas... things like that, you'll be able to find someone that you can gel with a little bit. And especially if this is one of your first hires, you're probably going to gravitate to the wrong things. Or you're going to say, oh, they're really fun to talk to, or try to keep focused on your job description and let that lead the way. Can they do the job that you've written down? Then we are going to pick one or not go find somebody else. But if you have like one ticket, let them know they have the job when they have accepted the job. By the way, this is not employee I know this sounds very employee like but the job being the role here. Once they've accepted that they'd like to work on the team, then you let everyone else know especially the people you've interviewed, that you will not be hiring them. This is important because how many people have written things and been waiting for an answer that never came? It's just nice to say, Look, I'm really sorry, you weren't the fit. It was we mean about it. And I know it sucks to tell people things and say no to people, I get it. But it's way, way better than just letting them hang out there and wondering for a while, how many times have you talked to a client, you're so excited and never heard back? It sucks. So tell the people that they didn't make it. And then get really excited that you have a new team member. I send a welcome email, you can either have information in an email or here's a folder, like a welcome folder in Drive. Let's say I have that. And it has a welcome to the team doc. And then it kind of explains all the stuff like we're gonna set up an email for you. And then like, all that kind of stuff. I'll go through that in a second, but welcome email information, what they need to know how to get started. I also send them a subcontractor contract. I am bringing them on As a subcontractor onto my business, this is how we work agreement. So we have a contract, we have a W-9 or a W-8 b(BEN) which is the tax document if you didn't listen to the last episode, if I am hiring a team member, I get a W nine from them. It gives me their name, their address, their tax ID, and the kind of business they are (LLC, partnership, that kind of thing). And then I use that at the end of the year to create my tax documents called 1099 that I send them so that I can claim them as an expense on my business and that they end up getting the amount that I've paid them on an official form that they can use for their taxes. So a very important document. Most people forget, and then they scramble, scramble. And then like end of January because you have to have your 1099 created at the end of January. And then no one has their paperwork or they don't know where it is and everything's a mess. This is classic. If you get it now and you're getting them on boarded, what if they only did a short thing in August, and then you don't talk to them again, like they only were here for a project. And now you have to try to find a 1099 from someone you haven't talked to in six months. It's awkward. Trust me, get it now. And then you're gonna want to introduce them to the rest of your team. If that's just you, then say hello. But if you have other team members, you're going to want to be like, welcome to the team. This is this person, they're going to be handling this. Some of our teams like my team is pretty isolated. We all work different parts of the country. There's not a lot of interaction with them. They all handle different clients. But there are other teams that really works together. So you're going to want to introduce the team and get them going. Maybe have a meet and greet and have a wine day or something. Wine Day. I think people only have wine happy hours, but I guess apparently I have wine days. Okay, so we've had the contract. We got the W-9 we introed the team. Now we're going to set up those systems. So that is going to be that breakdown that I was talking about the "Welcome to the team" thing, and I'll go through it now what I do just so you can have an idea. Anyone who works with my team that is going to be especially talking to clients, client facing, get a Reynolds OBM email through Gmail. So there'll be, you know, whatever their name is at Reynolds OBM. When they're given access to the email, they get Gmail and drive, and whatever that goes with. The big thing here, and this is why I pay the $6 or $10 a month for everyone to get their own email address. If it is on my company email, at Reynolds OBM, calm and they leave, I turn their access off to that. And then everything reverts back to me. If you let them use their own Gmail, or their own email, and whatever, and then they leave all of the documents that they own, they still own. So they created a spreadsheet for you that you use every day. they own it, they leave with it. Now, most times people will just hand over That kind of stuff. But if it's a little unfriendly event, you want to be able to have all of that. If you want to get rid of someone, you want to be able to have control over your own internal company stuff. So giving them an email, and then being able to turn off that access, and then still retain everything really important. It's better to have systems to protect you and never have to really use them than to get into a real jam, they get a Gmail account, then they get access to teamwork project management system. That is where we have all our tasks, everything is in there. There is recurring tasks for everything. And they also track any time and put it in teamwork as well. So I can look at any client at any time by the end of the day and know exactly where we are really helpful if you're having retainers, if you are have blocks of hours to be able to book all that kind of stuff, time, tasks, and I can look and see what everyone's checked off like if they had 10 tasks for the day and they checked them off. Great, I don't have to go then drive them all crazy. Seeing like, what do you do today? How did it go? Did you get everything done? Like no I look at I see, everything's been tucked off we're good. Next is a huge thing for the team. Huge, huge, huge here. Slack. slack is like an instant messaging service. But it's way more than that. You can have channels for different clients so that all the team members on that client, or that project can talk, then there's direct messages, all of that kind of stuff. And then it's constant. Being able to communicate very easily without send email, wait for a person to reply, send another email you know what I mean? Like it's much, much cleaner. And it's so much easier to keep track of everyone. There's so much better of a community, whatever can chitchat, even if it's just about our kids that day. There's such a culture base around Slack, and it's really, really very handy. We use LastPass here for all of our people. passwords. Do not email passwords and credit card numbers over like your email or put it in a sheet. Things like that are easy to get into. It's easy to hack, things like that. So we keep everything in LastPass, they usually have our own LastPass account, it's not a Reynolds OBM one, I'll explain why. So usually they have their own account at you know, mary@gmail.com or whatever. And then we can share our LastPass information, passwords, credit card numbers, whatever to them, you can share it without showing them the password too, so they can't change it. So it's very, very convenient. You send it over to them. And then if they leave, you can just go into LastPass and take all that access away. If you have it on a Google Sheet, all the information, all the passwords, let's say I was handed a 14 Page, Google Sheet one time of all the passwords in the company when that person leaves and they still have a copy of that, what if they printed that out? They can get into everything once they leave. If it's not a happy ending, that's a problem. You have to go in and change every password on that 14 page sheet. With LastPass, you just unshare. And you can see everything that they see. So it's not like oh, I don't know if they have that password, maybe we should just change everything. And then everyone else doesn't know the new password. Don't do that. Totally get LastPass or there's other ones out there. There's one password, there's a whole bunch of other ones. We use LastPass. It's $3 a month, I think to share to your team. It's totally, totally worth it. And you can put credit cards on there if you have like standing things that they get paid for. Or if you are someone who's going to have an assistant buying things like buying supplies or things like that you can have your credit card in there safely and then unshare it if they leave, and then you get your stuff back. We time track here especially for our retainer clients. We also time track on projects so we can have an idea of how long things are being set up, how long things take. And then also how, how did they get paid? That's a real big thing like, Okay, well, you've decided on the rate, when did they give you an invoice? When should they get paid? They have to wait until you've been paid from the client, or are they going to get paid on schedule? Like what is the deal? It's really helpful to know when they can pay their bills. So payments, invoicing, really important anything like vacation time, like if they're going away, what kind of notice would you like, things like that? If you have a team calendar, all those things, you could put them in all in like a one sheet and give that to them. So they they understand what's going on what's expected of them, what systems are going to get that kind of stuff, and then it makes it nice and easy. The whole goal with anything like this first impressions either client onboarding or team onboarding is a great first impression. Everyone knows what's going on and everyone feels confident to go forward and to get going. Right? You want to keep that excitement going. So we've entered the team, we've set up systems, talks about the way we work, having that welcome to the team or a team Handbook, something like that is really, really helpful because people know what's going on. And then clear expectations of what is expected, is going to be so helpful. I know in the beginning, sometimes, especially when I was just starting out as a VA, and I didn't know how this worked, coming into a business and be like, Okay, I'm ready. And then no one really knew what to do with me after that. There were a lot of, well, I don't really know what you'd want to work on or having a plan for what's going to get started, even if it's just one project. And then you figure out the next project after that, having an idea of where they're going to start and what they're going to first work on, so that they can get going and then they can start like kind of learning the ropes. And then really giving great expectations. If you have a project for them. Give them a due date. How much do you want them to do? What should be involved like this should take four hours, maybe don't take 17 hours to do this, because you're really excited want to do a good job, give them an expectation of what they should be doing and when it's due, so that they know what's going on. They're not psychic, they're not gonna know immediately when they walk into a business, all the stuff and what's expected and when to do it. The expectation problem is, a lot of the reason hires don't work out. They don't know what's going on. They don't know what's expected of them. And then when they're not perfect, the person that hired them was like, oh, they're terrible. They don't know everything. I did this. My first hires were terrible. They didn't know what I was talking about, I nitpicked on things that didn't matter. I didn't really give them clear instructions. So when they didn't know what the hell was going on, I got mad at them. But it wasn't their fault. It was my fault because I was a mess. But that's what you learn your first one or two. Expect it to be a little rough, you're figuring it out. All of this. Come on, most of this is just figuring it out. Give yourself a little bit of space on that. And be very, very clear on what's going on. And give them simple things and give them stuff that you work on for yourself. So when I bring on anyone, a new team member to my team, they work on things from my business before they ever go near client work. I want them to understand how we work what's going on. I want to make sure that they're on top of things before they ever touch client work. I would rather than mess up something in my own email system or delete a file by accident or something. I'd rather be my own stuff. Then a client's work. By the time you're on client work, you are so good, that I don't have to worry about you. That's how I like to work. I my clients are so important to me. I wouldn't want that. Like I'm just gonna walk someone in and let them mess anything up. So clear expectations. Super, super important. Also realizing when you're not giving them when you're being a terrible manager, if you've never been a manager before, or you've never had to hire someone before, you're gonna mess up, and it's okay. Learn from it though. And then do better. Don't just blame this random person that you've brought in nine times out of 10. It's not their fault. And the last thing is going to be something that's near and dear to my heart. I want you to have systems and SOPs so that they know what is going on. Now, a lot of times, especially if this is the first hire or two that you're having, you don't have any of this already. And they're not going to know what the hell's going on. So you're gonna say, can you go set up a thing a call, or set up a process, and they're gonna be like, how do I do that and you're gonna go, Oh, I don't have to train you and everything, and then you're gonna get aggravated. The best way to do this is to set up SOPs even just a few at a time. Time and just try to stay a little ahead of that person. So if you want them to start doing a thing, setting up meetings or setting up a process, they need to know how to do that. And the best, best way to do that is to record you doing it. If you create a video, and you can use Loom, it's easy and free. It just records your screen and what you're saying, You don't even have to be on the video. So you just record whatever you're creating this email, you're creating this process and you record yourself doing it and you give them the video. They can take the video, they understand what's going on, they can see you doing it so they know where to click and what to do. It's a lot easier, especially if you're not great at giving directions. It's so much easier because some people write instructions and they make no sense because they know what they're talking about, but no one else does. So making a video, they can see what you're talking about. The blue button not over there, but over here, that kind of thing. They can then take that and learn how to do it, write the SOP themself. And then start creating this kind of operations manual of how we do things. That is the easiest way to train someone on simple things that you are doing that you need to get off your plate, which is the whole point of this. Most of you out there, if you're just starting to hire somebody, it's going to be help admin wise, that's usually the first hire. And a lot of that stuff is in your head, and you want someone else to do it, but you have to show them how to do it. So having a SOPs is a great idea. And you can start with a couple like when you know you're going to start hiring someone, start just taking those videos and seeing like, Okay, this is how I create a templated email, this is how I create a thing in QuickBooks this is you know, whatever the thing is, then they have a little store of all this knowledge now, and they can make it pretty, because there's lots of us like to make SOPs, make systems. Giving them the knowledge so that they can go and do their jobs really well is extremely important. Expectations and training are the biggest things to making something work, having that set out and having that information there, killer. That is what's going to be the thing that carries you through. Okay, so a little recap here, because that was a lot of me talking about a lot of systems (which is a Tuesday night at the Reynolds household). So you're gonna have a job description so we are clear on what we are looking for and what they are going to be doing. Everyone being clear, is a bonus. Using a system to get that info Google Forms type form, something like that, where they fill out the information, it goes into a spreadsheet, it's very easy for you to scan through and easily weed people out that don't apply instead of sitting there reading over emails and resumes and that kind of bull. Having interviews being focused on interviewing people based on what you actually want out of the job description instead of that they're really nice, and you like talking to them. Then picking one telling the others that they're not they haven't been picked. Then a welcome email with some info in the email about how we work what's going on a link to a hiring folder maybe. And that hiring folder could have a welcome to the team, a team Handbook, SOPs kind of operations manual, any of that kind of stuff could be in there so that they're ready to go and they know where everything is. They're not just sitting there waiting to get started. Before that, really you should have this contract before you give all that but so we're gonna have a contract, we're going to get a W-9 or a W-8(BEN) signed. So we're ready for taxes. We're going to introduce them to the rest of the team. And then we're going to get them set up on our systems, emails, project management tools, slack LastPass, any of that kind of stuff. And then the way we work, making sure they understand all of that kind of stuff that you've sent them, the "Welcome to the team", how we get paid, what the vacation is team Handbook, going over that with them, making sure everything's really clear. And then setting really clear expectations of what you're going to do when you're going to start when things are due, so that they know what's going on. But also, everyone knows when they did a good job. If you can measure it, then you know that they did a good job. And if you just give them things and you're not really sure they did a good job because you never said there was a goal. It's going to be really hard to figure out if they're doing a good job and if you want to keep them. And then the last thing, having SOP s having those standard operating procedures, having the instructions, they're ready for them so that they can take it and run a lot of us are so overwhelmed by the time we hire someone and we're just like please just go to this job and fix everything and solve everything and be amazing. So many job descriptions asked for a unicorn. People are great at their job. They do do need to know what their job is, and be given the resources so that they can go do it. You're probably going to mess up if this is your first time. It's okay. You'll figure it out. Start small, a couple hours a week, maybe four with a VA. If this is you've been hiring people for a while, but have had bad luck. Maybe sit down, go through these steps. Figure out if you've been missing something. If you've had, a lot of really bad hires. Where do you think you're going wrong? Is it in the job description? Are you not being clear? Or you're not giving them enough information, clear expectations, that kind of thing? I think this applies to everyone because we can always be better managers and be better business owners and be better at hiring people. Right? We can always learn more. So I would love to hear your thoughts on this stuff. Reynolds OBM on Facebook is where I hang out mostly. Please come in and pop in a question. I would love to help you out. So good luck guys get out there and get some help. And I think it's gonna be great. And once you get more time in your life, you who are gonna be like why did I wait so long to hire some team members? All right, I'll see you next week.