

Sink Handle Episode 21 transcript

Hello, everyone, and welcome to Episode 21. This has been a long week. This is actually the beginning of the second week of homeschooling here. I am recording this podcast at the last possible moment to get it live for you guys on time. This week just got away from me, there's been a lot happening all at once and I am clenching my jaw like a crazy person. I'm a little stressed out. So I figured some of you may be there to. Virtual school last week was our first week, which is... you know, the start of anything new is always a little nerve wracking. And then trying to figure out the systems and the schedule all day, while trying to figure out where your clients are, what meetings you're supposed to be at, and what meetings your kids supposed to be at, and all that kind of stuff. It's, it's been a lot at once. On top of that I have a wonderful new client that I want to make sure that I'm taking care of, as well as another client who's been with me forever, who is going through some major changes in their business, and they need some attention as well. And I get stressed out because I want to do a fantastic job for everyone. So in light of all of that, I this morning, I am working my way through a method of figuring all this out. I need to get organized. Over the summer, things were a little calmer, there was a lot of just recurring things, it wasn't anything crazy going on. And then a lot of crazy hit it all at once. When things are just running kind of on their own, you know, you get lacks, um, you know, you're supposed to be it's kind of good, you don't have to stick with all the organizational things that you needed before. And now I need them again. So I figured that you might be in the same position and trying to figure out how to get it all done, especially around the topic of getting help. So today, I want to talk through how you delegate, what you pick... how you pick the things, how you get it off your plate, and getting your head around that whole process. So you can do it. And it's not a crazy mess. When I'm looking at a project to manage or a client that I need to take care of and get what I need to get done, plus make sure that my team is taken care of and everyone has work, right, because I want to make sure that my team has enough work; plus, I want to make sure the client stuff is all covered. To get all of those kind of pieces in order. I have a task breakdown sheet that I do. That is my way to lay out everything. And then kind of pick what's most important right now, my task breakdown sheet is just a spreadsheet. I do it in Google Sheets, because it's easily shareable that way. Everything is laid out all the tasks, specifically the tasks are laid out. I have columns that are like topics. So if it's like payroll or accounts receivable or team management, whatever the thing is, I like to put it on topics that way I can kind of group things together. And so if I'm working on someone's payroll, I can put them all together like that. The next thing is a task. What is it? "Move funds" or you know "Submit this", "Update this". Then there's "Currently Assigned To" third column who it is now most of the time that's going to be you... which is...

my name is on that column way too often right now. "Frequency" is it weekly? Is it ongoing? Is it monthly, bi-monthly, whatever that is, you can kind of have an idea. If you have a ton of things that are daily and you dump that all in one person, that may be too much. So being able to kind of lay out like, Okay, how many times does this happen? And how many times will this person be doing that? It'll give you a better idea of what capacity everyone has? And then is there an SOP created? Is there some kind of system around this now? If you're going to want to hand off anything to anyone else, you're going to want to give them instructions on how to do it right? No one's psychic. Is any of that created?

Now? Do you have an SOP, there's an SOP I have just for me, because like I have to build a webpage for the podcast episodes (every episode has its own webpage, and then goes back to like, like an umbrella page for the podcast) and there's code that I need to know. And I obviously don't remember what it is make the box that I do the thing with. So I have a piece of it just for me. It's not just for delegating, I need to remember how the hell to do this each week. Next column, this is important, "Can it be Delegated?" and I'm going to say 98% of the time that answer is yes. Obviously, if it's 98% of time, you're like why are we marking it? Because you need to see in your brain that yes, all these things can be done by somebody else. There are very, very few things that you are the only person in the world that can do. Those are really important and you should be charging a lot of money for those by the way. Everything else can be delegated. But you can also make it a little bit more descriptive like "yes, but later" or "right now" this could be like the first thing it's a very simple task that I can get rid of easily. So you can put not just yes or no, but something like "Yes, later", "Yes, immediately" this should be first and start to figure out which ones you think will be easier to hand off. Some are going to be harder. Some are complicated some, it's really a strategy thing, or a thing that you don't want to get rid of. "Yes, but you don't want to" is a fine answer as well. And there are definitely things that I really like doing. Yeah, I can give them to somebody else. But I really liked doing that and mark that there too. Because when you look over the sheet, you're going to start to see patterns of "Oh, yeah, I don't even like doing this task." That's easy. That's when you're going to be able to start looking at it holistically, kind of a macro level, high level view, and then picking out the things that will be the first things to go. Then the next column is "to who?". Who are we going to delegate this to? So I have my team and if it's a bookkeeping thing, it's going to go to Kristen, if it's something else, it could go to Gwen. Different things probably will go to different people. So write that down. Who is this? Or do we need someone else for this? Do I need another team member. And then the last one is just a notes call, this can be scheduled for this, this can be "automated". That's another option as well. It doesn't have to be to a person. This can be an automation that you put through, there's 1000 different ways to automate things, especially now between Zapier and Dubsado and all these other software's that you can set these things up automatically, who sends out the contracts? Well, if they sign up on the website, it does that itself, it's automated. And that's a way of getting it off your plate as well. So that to who can be a system or a software and app, that will work as well. I'm going through this list today. Because I have been doing way too much, I fall into the mindset of "Oh, well, I'll just do it this time, it'll be quick." And then next time, I do it again, too. And I never really give the work away. And then I'm crazy and busy and working at 10 o'clock at night. And there's no reason for that. And if you were doing it, I'd yell at you for it. I've actually been told to listen to my own podcast last week by my husband and my team because I get so wrapped up in making sure everything's right, that I forget to delegate. So I feel your pain out there. If that's you as well. Going through the sheet, I go through all the tasks, everything "send email" to "create new spreadsheet", "update this" whatever all the things are, that you do and take some time, like, block out a time period, like an hour, and just write down everything. I like doing a spreadsheet, because you can move things around a little easier. And you can share it better than you could, you know, share a notebook. So go through everything, and really break out the actual daily routine. Don't just say, oh, create system, what are all the tiny steps that you need to do, because maybe you can do half of it and someone else can do it the other half, or maybe you can automate half of it. This is the way to lay it all out. And then you can start picking out what you can hand off. Okay, so now you've gone through the task breakdown, you've written down all your tasks.

Everything. And you start to see a pattern of some simple things that you can start getting off your plate. From there, I want you to choose a couple, even just one to start. And then you can choose more as you go. Choose a simple thing and see if you have an SOP created. See if you have any instruction for that. This is going to be the key. This is I think, where most people and me in the beginning, I really did mess up very badly in the beginning, giving somebody a job to do, and then not telling them how to do it. Or when it's due or what your expectation is in any way. Just set you up for failure. Giving them clear instructions, telling them exactly when, where and how to get that done. And what the due date is, is so simple, but most people don't give due dates. Having those clear instructions is completely an utterly vital for you not have to micromanage and follow up all the time. So I had to create a system the other day to send out documents for a client. I mean an SOP because I'm nerdy like that, and I like making SOPs but I made a video on Loom as I went through the process to do the thing. I set it all up. Set templates up. Set everything up. "This is how you do it", "click here" and I'm saying like, "click this yellow button", "go here", "next, do this". Don't put instructions that say "create forms". No one knows what you're talking about. List out what you want, and when you want it. Then you hand it to that person. I send the video and the SOP to my team, my team can then look at the SOP. Watch the video because they can see what I'm talking about if anything is unclear, because when you first write instructions, you always forget something right? I hand it over to them, I now no longer am doing this process. I don't have to do it again. Because I was very clear. In the instructions there is exactly when it happens, how to log in anything. My team had to do it that day, they went through the whole thing, there was like one question because I didn't send the right password. And that was it. Now, that is someone else's job. And that's how you don't micromanage. If you give them half-assed instructions, and then they have to come back to you for 40,000 questions, or you are constantly having to explain, "Oh, well, there's this", "Oh, well, there, in this case, you have to do that." Write it all down, take the time, even just make the video and send it to the person and say "Here, this is how to do it. Learn it. Make the SOP yourself". For anybody who is a new listener by the way. SOP is Standard Operating Procedure, it's just the instructions for whatever we're doing. So having that video and the SOP whatever the instructions are, you can hand it to them. And if they have questions, obviously, they can come to you. But now they know how to do it. They don't have to come back and forth, you're not sitting down. Like I remember when I was first corporate training was always sitting down next to someone for like two weeks, while they showed you everything was always disorganized. Some would say like, they'd sit next to you. And they just ramble things off. And you're trying to write notes, and you've no idea what's happening. And then you go to try to do it. And then the process wasn't clear. So you're like, wait, what do I do? Do I have to do it here? Or is this there. And then it's a constant training session. Get a clear process, write it down clearly, and hand it off. Right now, in the apocalypse and everything, it's been hard to hear that people are trying to get help and they're saying, "there's no good people out there" or "No one does the things I want them to do." Remember that people are not psychic, you have to tell them what you want. You have to explain that I need you to send these emails every day next week. Or I need this report done. I need it by Tuesday morning so that I can go to a meeting on Tuesday afternoon with it. Explain what you need. In the beginning, when I first started hiring team members, I didn't know I've never really managed anyone before. So it was like I didn't know what to do. And you're like, Okay, here's the thing, can you do this? And they say, Sure. And I think in my head, can you get that done in the next two hours? Because I need to get that back to a client. They think, oh, I'll get it back to her this week. Right there. That can be the mess of a relationship, like anybody who's married out there understands this. You're talking to different

languages. If you're speaking two different languages, and the other one's like, well, that's not what you said, well, that's something you said. So be clear, write it down, or make a video about it, let them write it down. But either way,

Communication is key. Accountability is key. This needs to be done on Tuesday, I needed by 10am. If it is not there by 10am now we have a problem. And the accountability piece, I don't want you to be up someone's rear. Accountability is really just checking in. And I don't want you to have to micromanage. I hate being micromanage. And I hate having to micromanage. If I have to check in with my team all the time and make sure things are going, what are you doing? What do you do? drives me nuts drives them nuts, they don't want to hear it. I have everything scheduled out in teamwork. It's in my project management software, everyone's assigned out things. Tasks are in there you go in there every morning, you see what you have to do, I can look for the day, see what everyone's checked off as "Done". And that is our biggest way of communication. We also do beginning a day and end today reports just in Slack, we have a channel that's like beginning a day, I'm gonna work on these five things. End of day, these four things got done, I had a problem with the fifth one, I'm going to work on it tomorrow. I don't need to then go have a meeting with them every day. I rarely have team meetings. We all talk to each other all the time, but especially since we are all working at different times with our kids and our businesses and we would different time zones. And it's so much easier to just check in on Slack. Say, "This is what I'm working on. This is what I'm gonna be getting you." We have the accountability when we are working. So if I'm working at 9am, but my team isn't going to work until noon and I know where they're going to be without having to be like, "Okay, let's have a team meeting at 8:30" because no one wants that. I don't have a team meeting every morning at 8:30. Sounds awful. Having these clear instructions and expectations... really be over communicative and tell people exactly what you expect of them, they know what they're expected to do, then, then they can do it. And then if they don't, then you can say, oh, they're crappy. But I'm just hearing a lot lately of people saying there's no good people out there, when I feel like the market has just been flooded by people, highly skilled people that have left the corporate jobs that got laid off, and they want to go out there, but they don't know this virtual gig, or they don't understand what the hell you're talking about, because you only explained it halfway. Give your people a chance and explain everything. The systems are the key to getting the work off your plate, and not putting more work and managing on it. Okay, so task breakdown, pick a couple things. And then you're going to do clear instructions and expectation. So video SOP, whatever that is, have accountability, have a due date, and then have them check in with you. You expect to hear from them by whenever. Don't put it on yourself to be constantly following up on everything and start to put systems in place that they tell you. And then you can just check one sheet or check Slack or whatever that is, I check Teamwork. If all the stuffs done, then it's all done. I don't have to go ask a million questions. And just know that the longer you work together, this, the easier this handover will get. When you first start with someone, you have no idea the way anything works. So just remember, like this gets better. And it gets easier. And you guys all start to understand each other, start small, get one thing down, give something else. Don't just have them come into the business. You say "Hi, I need you to fix these 12 things, figure it out." Because unless they're really good and psychic, that's going to be a disaster. Let them help you. But tell them what you expect. It's just like, if you have a cleaning lady come to your house. And she thinks that the most important thing to clean is like the inside of the refrigerator. But you think the most important thing is to have the bathroom you share with boys clean. You're gonna walk into the bathroom be like this lady sucks. Like,

my bathroom is still dirty. And she's like, but look at my fancy clean fridge, they're both trying to do a good job but it doesn't work. New projects are going to come in and you're going to want to update this list. So I just pulled out I haven't done one in a while because we've been on autopilot. Everyone kind of knows their gig, we all have these things going on. We knew where everything was. And now there's been a big couple of shifts in the business, wonderful shifts. But like now we have to organize, I'm doing too much. When you see your name on that sheet too many times know that in the next week, you're probably going to do those things. And then you record the video on Loom. Explain how to do it. As you're already doing it. You're just basically talking out loud while you're doing the thing you're already doing. It's not extra time. And give that video to the new person. Tell them when you expect it done or how you expect it done. And put some accountability to check in in place.

Next task... and keep doing that. And slowly you are going to move tasks off your plate until you are moving projects off your plate. And then you start to pick and choose the things you actually want to do every day. I hope that this has been helpful. I'm going to spend the rest of today doing a lot of this. So get in there. Write your tasks down. Start moving some stuff off your plate. It'll be nicer. I'll be nicer. I won't be so cranky. Well, who knows? All right, guys. I will see you next week.