

Sink Handle Episode 29

Hello, everyone, and welcome to Episode 29. So when we start out in business, so many times, it is just us, we are doing all the things, right all the things, even if we don't know how to do all the things, we don't have the support staff or the money or whatever to really have it all built out already. So when we are doing all this stuff, we are the only ones who know how to do it. And then as you maybe hire someone, you have to get that knowledge out of your head and give it to somebody else. And that can be a really daunting prospect, right? That idea of Oh, this is gonna take forever, right? But how do you teach someone else to do the thing that only you know how to do? How do you get that knowledge out of your head and out to someone else, so they can help you? And you are not the only one doing it? All the time every day. So I want to start with some of the roadblocks that come up for most people because, well, let's start with the problems first, right? No one can do this as well as I do it, which is complete bull. If you are doing all the things, you cannot be good at all the things. So for most of the things, there may be someone who can do it better than you, not just as well. But better.

There are certain things that are you know what people call zone of genius, those are the things you do so well, that maybe you are the best one who can do that. And those are the things you should keep doing. But there are a lot of things are out there that are not your zone of genius, they're not your best stuff. But they may be somebody else's best stuff. So letting them do it will make your business better. Plus, there's a lot of things out there that you think you are the only one who can do, but you don't even like doing them and it makes you frustrated. You're doing it at nine o'clock at night and let someone else do that, too. It will be faster to do it myself. If it was a one off thing where you knew how to do it. And we're just going to do it really quick. That might be true. But if this is a recurring thing, or something that happens even once a month, doing it once a month still takes more time than teaching someone and letting them do it once a month. I know it feels sometimes like, oh, we'll just be faster. But it won't eventually. Three, what if they mess up? This is a big one, right? Especially for us perfectionists who want everything to always be perfect and right. And I gotta tell you, they're gonna mess up, you're gonna mess up, right, you're doing all the things and you're not doing them as well. Maybe you want him everyone's gonna mess up at some point. We train them as best as we can, we support them as best as we can. And then we hope for the best. And that's part of managing. That makes it a little scary sometimes. But you have to give them a chance. No one knows how to do anything perfectly the first time. You didn't do it perfectly the first time. So I know that that's a big stress. I like everything to be perfect. So when I first started having my team, it was really hard for me to let go. And now I give things to them. And they do it better than I did. And now I've learned it's better. And four, how do I train someone else without taking over my life?

The whole idea of getting things off your plate is for you to give them to someone, and take them not for you to constantly have to train and manage, like, if you're constantly doing a thing to show them how to do it, it's still on your plate. We've talked about this before. So making sure that you've trained them to take it away from your plate is the goal. And that is what we're gonna figure out today. And that is what we're gonna talk about today. Because a lot of times we have spoken about figuring out ness before

that lovely innate ability that people have to just see a problem and go figure out how to fix it. They Google it, they research it, they do whatever they can but they could figure it out without a lot of hand holding. And that is a really great quality and person and a person. It is something I'm hiring for right now.

The problem with figured out ness is when you do that, there's a lot of margin for error, which on a lot of things will be okay. If you don't know how to do it, someone figures out how to do it. That's great. But if you have somebody who is going to take over let's say running your payroll for your company, figure it out. This is not really the best way to go here. You know if the process is long or complicated or very, very important like paying people on time and correctly, instructions are very, very handy. No one wants to guess. So, yes, you can figure it out on a lot of things, but some things you really want to write down and pass them on. So I wanted to share my process, because I'm going through a lot of this now as I am bringing on another team member. And I have been very conscious of how I'm going to get the things out of my head to someone else. So I figured I'd share.

So my first step is whoever does the task, record a video of them doing the task. And then we use loom and loom, it's software where you push record, and you can record your face, just the screen your face on the screen, or just a headshot on the screen. So you can be in your pajamas doing this if you want to. And then you do the process. And as you do the process, you can talk your way through it. So if you're doing payroll, let's stick with that example. You can open up the thing, log into this show what folder the information is in, go into whatever system you're using, click this button, and then that person really really gets to see what button they're pushing, like which green button, where are they going. And it's very, very easy for them to see the process and how the system looks. And where everything is. You can also say, you know, usually on the first of the month, we do it this way, on the 15th of the month, we do it that way. And all of that commentary is in there. And it's really helpful for someone to see how it happens. I think it makes things very clear.

My next step is to have an SOP created from that video. So if it's a complicated thing that I'm trying to get out of my head, I tend to make the SOP I will write down all the instructions, and then kind of I sometimes will write down the instructions, and then make the video out of I will sometimes write the SOP first if it's in my head, and then I will make the video going through the SOP to see if I've missed any of the steps. But that is way high level nerd. So it may be too much for all of you. But if it's complicated, I will make the SOP myself to make sure that there's something in there. If it's something that is obvious from the video. And I think this covers almost all. You take that video and you give it to someone else who's going to be doing the task now. They watch the video, they ask any questions that they have. And then they make the SOP, the instructions, the standard operating procedure for that. And we do ours as a Google Sheet. No, we do ours as a Google Doc in Drive. We have everything in there batched by category or like HR or pay, you know, whatever that is.

So step three is to take that, that Doc, that whole SOP and then take that link and put it in what we have is an operations manual. We have a sheet that governs all has tabs per job description or per category, like AR HR, you know, sales, whatever that is, and then everything goes in there. So if all the payroll stuff is together, there's forums, there's SOPs, there's whatever, everything goes there, and all of it links to the spot and drive that it is. So if anyone ever had to come into my business, and quickly

figure out how to run payroll, let's say they could go to the sheet and have all of the information, the policy, the forms, whatever is all there linked, and it's in Drive, which makes it very, very easy to figure out where everything is. So that seems like a lot. And for something more complicated. That could take a little bit of time, just because you're trying to make sure all the things are in there. But it's not hard. And I tend to be a perfectionist, and I tend to think I should do everything. It does not serve me well. So putting this information into a place like the video that I can hand off to my team, they can see what's happening. Then they take it and run and I no longer do them. Though, they'll look at me and say okay, I got this. It's mine now and then we switch the task to teamwork and our project management system.

My name doesn't go in there anymore, it goes to their name, they have everything there. Oh, that is another thing, if you are going to take the SOP, or the form or whatever all those information is and put it in your operations manual, you can also, in most project management systems, link it to the task. And this is high level nerd here. But I have teamwork, we have tasks and their templates, all that kind of stuff, you can actually put your SOP right in there. So when someone gets assigned something, everything's in one spot. But that's, that's it. So the whole idea is to do the video, make an SOP from that, then put that SOP somewhere that's easily findable.

To make SOPs easier, I will if it's a lot of typing, and you want to go faster, I will put it into a transcription service, like otter, it's like 10 bucks a month, you get like 600 minutes or something. So I'll do that for my podcast as well. But for SOPs, it's great, you make the video, you have it transcribed. And then you can just kind of format it to an SOP less typing in that way.

Okay, some notes on all this. Everyone has the potential to not be perfect the first time they're doing something. I know I said this before, but I want to remind you that it's true. That may be scary. It's just the way it is, it will be okay. If you are worried about a new person taking things over, I start small. If I'm putting someone on my team, I start them off on my own stuff. If they mess up my own stuff, at least I'm not worried about a client. That is the way I test out new people. I don't put them on client work right away, usually, unless it's doing something and then they give it back to me second, check it like if they're creating some kind of document or something. Try to build it a little bit of a failsafe there so that if they do mess up, it's not your know your whole business. And don't give them the keys to the castle the first day, give them a chance to learn and set them up for success. Encourage questions at all times. This may be annoying sometimes when someone is like, I don't understand this, can you please explain again, that probably means that you're not explaining it correctly, or at least in depth enough. Or even just the way they learn, right? We all learn differently.

Some of us learn by hearing things by writing things by you know, whatever, but we learn differently, we hear things differently. An engineering mind and a creative mind will hear the same exact instructions differently. And that's why I like the video plus the written, it really covers all the ways people learn and then everything is right there for them. But encouraging questions, you don't want to be the person who everyone's like, Oh, I can't ask questions. He's gonna think of an idiot. or encourage questions simply because maybe you missed a step. Remember, we're not perfect either, right? So when you read all these things down or you make the video, you might be you missed a step.

A lot of times when we've done it 1000 times. It's because we know what we're doing. And we may or may not start halfway through the process, like logging in, and clicking the button. Like there's been a lot of instructors I've read over the years. And we're like, here. And you're like, Wait, how do I even get there? Where do I log in? What do I do? What button do I click to get in? Is there a dashboard? like where do I start? And when we've done it 1000 times we know how to log in? We didn't think about that. So making sure that all the parts are there, well will help with the questions. But so you want to encourage everyone to ask as many questions as they need.

If you want them to do a good job, let's set them up for success. If they mess up, or they are confused, I assume that I have not explained something. I have not trained them enough for them to know how to do it correctly. There's a very good chance that I have trained them very well. But I may have missed something. Like I just explained with the way, we learn the way we start in the middle of a sentence. My husband tells me all the time I start conversations in the middle, and he has no idea what I'm talking about. Same thing here. So if they're confused, I always default to the fact that I probably missed something. Not just because I want to blame someone for it, but because it takes the blame off of them. If they don't know, they can't be doing it the right way. And if I assume that they don't know that I can't be mad at them for not knowing how to be perfect instantly. So it's helped me mentally, just a mindset of dealing with helping new people and letting them off the hook. So I always assume good intent, and that I have may have not trained someone correctly. And that I need to do more to set them up for success.

That should be the whole mindset, setting them up for success. Yes, I know, some people are idiots. Yes, I know, some people are not going to work very hard. And that is what we're going to try to interview for. We're going to try to have a person in mind ready to go, that will be the person for this job. And we're not going to be perfect either. No one is. So you tried your best to pick someone good, and train them really well. And then you have to let go. And I know that's harder than it sounds. But I know that is the way to get out of here to get out of the stress and the overwhelm. I'm doing all the work the I'm working at midnight because I can't get it all done. And just like the awful feeling of why did I get into this business, I thought I was gonna love this. Cuz I want you to love your business. So have someone help you train them well, and then let them go do it. And you get to go to dinner or see your family once in a while. Or go on vacation. All the other things that you want to do, instead of sitting there doing things you don't like 11 o'clock at night. I know you can do it. I'll see you guys next week.