Sink Handle Episode 52

Hello, everyone, and welcome to Episode 52. So last week we spoke about the agency model of business, what that means, maybe if it's right for you to build out a team or an agency. And I mentioned that there were two. And I mentioned, there were two things that I thought were most important to have a successful team agency model. And that is, one is system. First one is systems. Second one is letting go, right, those two things together are going to be the way you get out of the micromanaging of the day to day, it is the way you get to have more time back instead of trading the implementation time for managing time. It's the way to get more time back. So today, I wanted to talk about that systems part. What do you need to build out to run your team or agency smoothly? What works for us and what has worked for us at Reynolds OBM.

But I want to make clear in the beginning here, I do not want you to build everything out perfectly before you start. None of you are psychic enough to know all the things you are going to need to know to build this up perfectly. A lot of us get really bogged down and making something really pretty and being ready and preparing ourselves. But there is no way you can know what you're going to need, you can start and then adjust as you go. Because just as I've kind of preached to over and over again, I want you to have the business you want to have, not the business I'm teaching you to have. My agency looks very different than a lot of other agencies. And it is right for me, but it may not be right for you. So you're gonna have to figure out how you want to run your business, and then figure out what systems work for you. There's going to be things here that some people for one some people for another. So don't get bogged down in the I have to build this all out before I could start thing. Okay, start small, keep growing, you'll be fine. So the first system I want to talk about is project management software. So important. Our rentals OBM my life everything is run around teamwork, teamwork. Teamwork projects is what we use here. I rave about it all the time. It's got so much capability that we only use a part of it to run everything. So the basics on this wait stop. Other project mule soft. My other project management software would be like Asana, or Trello, or a big one right now is click up. The basics are you can put a task in it, you can assign it to someone and have a due date. And then you can build all of that out. Right? You build all the task lists and everything out and everyone will know what what's going on. It can get much more complicated. There can be contingencies, there could be all this kind of crazy stuff. But the basics are, you can tell people what to do, and they know what to do. And it's very clear. giving someone a task without a due date is just setting yourself up for failure. They don't know when it's supposed to be Do you think in an hour, they think in three days now both of you are aggravated clarity here is key in all of these systems. Getting out of the managing means that you are answering less questions. That means there are less questions to be asked. That means everything is much clearer. So things are clear, you are out of the managing much more people who just go about their day because they know what's going on. So our role for teamwork is tasks always have an assigned person and a due date, even if it's like just a random one just to have it on the system. That is because whenever anything pulls if you want to find out what's due today what's due next week, it has to have a due date or it won't pull in. If you don't put a due date or an assignee it won't hit anyone's calendar or anyone's task lists. So even just having those things there and half the time I just put them to myself initially and then I can change everything out or assign it to people, but never ever without a task.

Without a due date and an assigned person. It just goes into the ether and then We missed things. So you want these things to be clear expectations, sweet. And needing to put an assigned person and a due date makes it clear, because you have to tell someone what to get when to get it done. And there's less confusion. So on. So the big thing here on clarity is, it works both ways. I get to go into teamwork every morning, I get to see what I need to do and what everyone else is working on. Then I can see what's been done, what's late, what's not getting done on time, if there's a problem, I have a picture of what's happening in my business and for our clients, without having to go ask a lot of questions have a ton of meetings, I get to see that at a glance. And there are different ways to function all of those suffers. But that's the basic you want to be able to see as a manager, what's going on. And then as a person on the team, you can go in and see what's expected of you.

Today, this week, whatever clarity. So key here. And to continue on with that clarity. Communication method is going to be huge. Obviously, you can email people, but we do most of our communication at this point in Slack, which is app, it's free to start, and then I'm free to start. So figuring out how you want to communicate. If you don't like using email and you hate having 1000 messages in your inbox, then don't use email, find something else. We use slack for that reason we can chitchat back and forth about, you know, a question we have, or about like our day or kids or there's that wonderful kind of watercooler chitchat kind of element to that, that you wouldn't, wouldn't really do an email because it's take so long to go back and forth, and back and forth. So there's that social aspect of it that really kind of brings the team together, you can wish everyone happy birthday, or any of those kind of things, and everybody can comment on it. There's that wonderful part of it. But it's also a really great tool to be able to just have people ask you really quick questions. And you can look, I can look at my phone, if I'm somewhere else, I'm dropping off my kid at school, I can look at my phone really quick and say, Oh, yeah, I can answer that question in two seconds, and then then go about their day, really easy to get information quickly without a whole deal. Because bad communication is chaos. If people are scared to ask you questions, and they try to figure it out, or they don't ever figure it out, or all of that kind of stuff, nothing gets done correctly, then you have to micromanage, checking in checking, checking in what we have in slack are obviously like, sort of what we have in Slack, our direct messages, one on one. And then we have channels by client or topic. So like podcast, or like if we're working on something for the podcast, and that way people can all talk to each other. Or if there is a client, then anyone who's working on that client is talking in that channel about that client. If they need a statement, or they need a thing or whatever, they can chat amongst themselves on that channel and know that that was all about that keeps it very clean. And then when you want to go look for something, if you need information about what happened with this client, you can check that channel, not the whole world. So it kind of focuses down and it's easier to find information. We also have a beginning of day, end of day channel, where everyone is on the team that's working that day on whatever they kind of post in the beginning of day, this is what I'm gonna be working on today. And today, this is what I got done. If there's any problems, if there's, you know, they need something from someone, it's there, I can then go in real quick. And check to see what's going on for the day, oh, this person's doing this, this person is doing that. Great. And it gives me a really nice picture of what's happening in my business without having to have daily meetings. I hate meetings that are useless. I don't like having meetings just to have meetings, especially since we don't all work in the same office nine to five. And I think it's a huge carryover from corporate to just have meetings to have meetings, which are just mind numbing, and we have things to do.

So we and most of my team are in different parts of the country and on different time zones. So to get everyone together for a weekly meeting, or a daily meeting, oh my god, that would be horrendous. And what a waste of time as far as I'm concerned because my business doesn't need it. Now, if your business does need a morning meeting check in because that's the way your business runs. Fantastic. Get in there. We don't need it. So we've cut that out. And we check in on slack. That way, if someone is coming that way, we all have like different lives and different clients, right. So we have to all kind of manage our time, and it gives us a better way to check in with each other without wrecking our schedules. Okay, so that's so we've got project management, software, and communication, for clarity. And to help as an as the owner of the agency, it helps me not micromanage, I can get the information quickly, without being like what's going on what's going on. But because no one needs the next system. The next the next thing I think is really important is training and onboarding. And this is going to help a lot with the letting go part of things. When you bring on someone, especially if it's one of your first people, you're gonna bring on your team. It's scary to let them touch things, what if they mess it up, oh, my God, I can't let anyone do anything, I have to do everything. And you start to freak out. train, train, train, train, skip that. training them will make them feel better, and it will make you feel better. And having that kind of stuff ready to go. Even if it's just one task at a time. Like I said, you don't need to build out an entire, you know, book, but just getting what you want them to do clear and handing it over so that they can go do the job. And then you can get confident they can know what's going on. And that's how you're going to grow slowly. When you hire someone, whatever your hiring processes, having a clean onboarding process is really so helpful. We have a welcome folder that I send, when they start has, this is how we work. This is our office hours, this is what we expect. I never expect you to answer a email on a Saturday from a client never all of that kind of stuff. So they know how we work here. There's some basic SOPs in there of like how to work teamwork. where things are, you know, like, here's drive. Here's some stuff, here's the things you're working on like that just kind of like first day stuff, here's where things are is so helpful. Because when you start you're like, I have no idea what's happening. And especially virtually you can just walk around the office and ask people, right, and you don't know what's going on yet. So setting the tone there is really helpful. They feel welcomed. They feel like they know what's going on. And they're not like what the hell is going on here. So that Getting Started info, some SOP is on the basics. And the funny thing is, no one ever says, How are they going to get paid? Like, what's your process? Do you need them to send an invoice on the 30th or the 15th? Or like, that's a simple thing. Everybody wants to get paid. And people want to know how they're getting paid, is there an invoice ahead of time afterward? Do they have to track hours for client work, or you chart you know, like, whatever that is, all of that stuff, get it in to this like kind of welcome folder, and you can build it out over time. I'm just kind of giving you ideas. That way they start and they're trained, and they know what's going on. And I have to tell you, we have gotten to a point now like, I send that folder, and there's very rarely questions on that portion of it, like we've gotten that part down well, and they can go into teamwork, and they know exactly where they're going. And they know how to set things up. And it's so helpful, and it saves a ton of time. Because a big thing about bringing on team members is that whole idea of I'm gonna have to sit there and train them forever. But if you kind of have these systems in place, they can train themselves on their own time. They can train themselves on their own schedule. So you're not sitting there. It's not like in the old days at corporate, where someone had to sit next to you for a week and you were tied to that person, you could get nothing else done. It's not like that here. If you kind of prepare ahead of time, even if it's just right before the one thing, right, and then the next thing prepare for that. And then it's done.

The next person comes in you don't have to prepare again, it's already set up. Which brings me to the last big thing I think is really important systems wise, is documentation. If you want to pass on all of that knowledge you have in your head to these people that you're going to work with. And you do not want to have to stand there and teach them. You need to write it down in some way. Having that information organized in a way that they can find easily is so helpful. If they can go to one central place and look up how to do a thing, they can take care of it themselves, they don't even have to come and ask you. So we have our documentation built out in Drive. And there are a lot of fancy systems out there, that you can build out your documentation. I tried some of them, this is the reason I saved the drive. Most of them you have to pay per user. And if I have one person doing one task, and I need them to get an SOP, I have to pay for that. And usually it's not cheap. So it became a little expensive to have all these users have access to the certain system, when we're already using drive for a lot of other things. So we have our SOP is all built out all of our documentation in Drive. And we also have a dashboard, I've talked about this, I don't remember what episode, I'll put it in the show notes about how to build out a dashboard. This is also what we do in the VA. This is also what we do in our VIP day, the system's intensive VIP day. This is also what we do on our systems intensive VIP day like we build out that dashboard and the SOPs and all that like that's because we've worked this out. We've done this so many times. We use it ourselves that dashboard, and then all the SOP. So you go to this one dashboard to get your act together dashboard. And you're going to see every SOP, if you want to go in and find out about invoicing, you could click the tab it says invoicing, you go to the SOP how to create an invoice, click that link, and you have the SOP, everything's linked in there. So they can just go to this one place of knowledge, find what they need to know, look through it. And if there's a video, because a lot of times I'll create the video, and then we'll create an SOP. From that just because it's easier to scan SOPs half the time than it is to watch the whole video. I'll put both in that place. So if they need to learn how to do something, they can watch the video, they can look the SOP. And then if they have questions, they're gonna come back to me, it's probably going to be a really simple question. Probably something I left off there. Because remember, you're not going to explain things perfectly every time either.

So we're should just remember, everyone. When when someone's missing, what, when something's missing, I always assume that I forgot to tell somebody, and I assume good intent. And we move on from there. Because you can't be perfect with this stuff, right? You fix the SOP. And you do it better next time. But having all of this linked, built out in Drive, and you can start simple, we started really basic and we've been building as we go every time now we have the podcast. And we have coaching and all this different stuff. Now we're building things off for that you kind of build as you go. But having that place that someone can go to find the information, and get the job done without really asking much of me is incredible. It's an enormous time saver. And then if you take those SOPs, if you want to assign something to someone, sorry, yeah. If you want to assign something to someone in teamwork, I take the link to the SOP and put it in the task. They get to their desk, they're ready to work. They look at what they have, they look at that task, and they're like, Oh, I wonder how to do that. Click on the SOP. That's where it is. They go and do the thing. They check it off that they've done the thing. They've never even contacted me. They've never had to ask a million questions. I didn't have to sit down and train them. Everything is all contained. And that means I have so much more time. And that is it. That is the key to not managing your team and your agency 12 hours a day. Having those processes in there, giving as much client giving as much clear information as possible about what they need to do and

expectations. And then giving them the room to do the job you hired them for. I am always going to tell you I love systems. I love SOPs and this is why this saves me a ton of time. I feel like I have a lot of control over what's happening without being a control freak. My overwhelming like wanting to know what's going on and all the things is easily found. That didn't make sense. I always when you're one of those people that are a detail oriented person who likes to run things as a do. You want to know what's going on with everything. You want to know that everything's being taken care of. And having these systems in place means that I can see what's happening without being an annoying pain in the ass. My team gets to work when they have it on their schedule. Everyone knows what's expected of them. And then they can work. They have the autonomy that they're supposed to as contractors. They get to see what's going on. They get to see what's, what's out there. What makes sense. They get to work on their own schedule, I get to have my stuff done, everyone's happy. The clearer you make something, the better. The clearer, you say, this is the way we do things around here, the better. And then everyone's happy. I love my agency. I love my team. But I also want them to be really happy. I want them to have everything they need to do a great job and have a great life. So to recap, project manager software, project management software, keeps everybody organized, to some kind of communication, our choices, Slack, makes it very easy to talk back and forth. But there's other options out there other software, three, training and onboarding well, giving them all they need to succeed, for documenting the crap out of everything. Even if you're just taking videos of things as you go, it's something you can hand over to them so they understand what's going on how you do it. And then you can figure it out. And that, my friends is how you get your life back. That is how you not you get to not micromanage that's how it works. There's an enormous squirrel and our bird feeder. Just getting a drink. So if you have any questions on this, I would love to hear them. That was so funny. I'm staring at the scroll. Sorry. So if agency is something you've been thinking about, I would love to hear it. I want to hear what your questions are what we want to talk about here.

And of course, if you have questions you want help in your business. Reach out we are reach out we are now doing that. So distracted by that fucking squirrel. No, I have no idea what I'm saying. So if you have the server you are thinking about this kind of model. If this is starting kind of play around in your mind either having a team or growing an agency. I would love to hear what questions you have. We are I have been I love hearing about what questions you have. So I know what to talk about here. And of course, if you have questions and you really want to work through your business, reach out to me about one on one coaching. I am loving that I am loving coaching. So uh, let me know. Alright, guys, I'll see you next week.