

Team Management

Module 2 – Your Business Management Toolbelt

Keeping it Lean

Finding the right team is not about finding a big team.

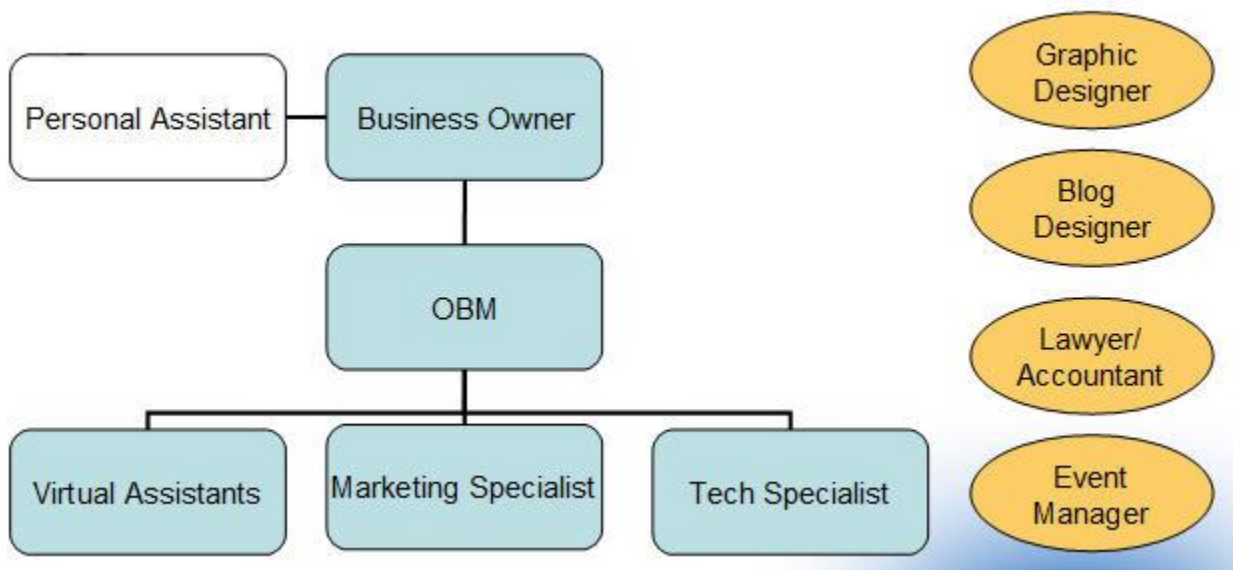
- Online Based Businesses don't need huge teams! Even 6 & 7 figure ones. Keep things simple. Online based-businesses operate differently than the corporate world which often have large teams.
- Automation vs. people – because online based businesses are so automated they are able to get away with fewer people.

"The more complex anything is, the more chances there are for something small to make it go off course" - -

Andrea J. Lee

When you're going 150 miles an hour on the highway in your car, sometimes all it takes is a mosquito to hit the windshield for you to swerve off the road.

Example Org Chart



The core team is quite lean – these are the folks consistently working for the business such as the OBM, the client and a VA (or two). These are the people who are doing the work on a daily basis.



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Some work directly for the business owner, while the rest work through the OBM or are coordinated by the OBM.

And then, of course, there are all sorts of folks who plug into the business on a project only basis – graphic designers, web designers, etc.

Contractor vs. Employee

The key difference is the mentality! Need to keep this in mind.

- Contractors generally have multiple clients – this can be a challenge when it comes to managing expectations. Clients can often feel the contractors should be available as if they are an ‘employee’, you may need to adjust the business owners (and your own?) expectations.
- Contractors generally don’t care about the business in the way you think they do. It’s not that they don’t care, it’s just that because they have so many clients on the go they tend to care more about ‘getting their own stuff done’ vs. the big picture of the business.
- Contractors are business owners themselves, this isn’t a *job* for them. As a result, we will never have their full attention –it’s just the nature of the relationship.

If the business needs someone 40 hours a week in a role, that could be an employee vs. contractor (don’t forget about the legalities of this!). Keep in mind there are different tax ramifications between hiring employees vs. contractors. In the online world it is pretty rare to hire folks as employees.

Before you Hire

Get clear on what the business needs are – create a Job Description

- What will the person do!
- What skills do they need? i.e.: shopping cart, html skills to send ezine, etc. Do you want them to have these skills already or will you be able to train on certain things?
- What response time do you require?
- How many hours do you need from them? If you don’t know you may not be clear on what you need this person to do and may want to clarify that.



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- What is your budget? The cost for subcontractors can vary widely so having a good idea before hand is helpful.
- You may want to ask/determine if the contractor is a 'starter', 'maintainer', or a 'finisher'. This determines what drives the person – i.e. what motivates them – and how (or if) they will fit the needs of the job description.

Again – keep in mind that being contractors, the person you hire may not be able to be as flexible to just 'go with the flow' along with their other commitments.

So, do your homework up front and get as clear as possible on the job requirements BEFORE you hire.

Where to find good folks?

- Start with who you know – clients, colleagues, classmates – where's the best place to go fishing? Where the fish are, of course! It doesn't need to be difficult.
- Check other people's recommended resources (especially good for project needs – graphic designers and such)
- Advertise to the business owner's list – this is a good way to find folks while concurrently adding credibility (i.e. Shows that the business is growing)
- Post on job sites – elance.com, guru.com, VA specific sites
- Do a search online
- Post at non-traditional places – craigslist – this is one of the most underutilized places to find people who are 'in the know'

First step - filtering

The interview starts from the very first communication, particularly in the online world.

- How quickly do they respond to your emails?
- Did they provide what you asked them for?
- What is the tone of their response?



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- Do they follow up with you?

Interviewing

This is where the job description comes into play. Having a good list of questions helps you tell if the person is the right fit for the position. Try to ask open ended questions – avoid questions that require only ‘yes’/‘no’ answers. Ask questions that require scenarios to be described. This allows you to ‘read between the lines’ and determine if a person is a starter, maintainer or finisher, among other things. You can do this by asking, ‘what if...’ questions. Past behaviour is a good indicator of future behaviour so ask ‘why’ questions.

Here are some sample interview questions for hiring a VA – feel free to add/tweak and create your own list.

- Tell me about your VA business and how long you have been a VA? What kinds of clients have you worked with (i.e.: coaches, lawyers, etc)? You can determine if they are a ‘dabbler’ or if they are experienced and committed.
- What is your background? How did you become a VA?
- What is your long term goal/vision for your VA biz?
- Why are you interested in working with us?
- Skill Review: Ask questions re: specific skills required
- Do you have a home office setup w/software? (i.e.: Dreamweaver)
- What do see as your strengths? Weaknesses?
- What projects are you proudest of in your work as a VA?
- What has been your biggest frustration in dealing with your clients? How did you handle it? (i.e.: how have you dealt with a client who isn't responding to your emails or phone calls? Or how would you deal with that.)
- How would you describe your workstyle?
- Who is your ideal client? what kind of client would you *not* want to work with?
- What kind of support would you like to see if you were to join us? training, emergency help, tech support, etc.



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- What is your experience with the coaching or self help industry in the past? (professionally or personally)
- What is your daytime availability? How many hours are you looking for each week? (don't assume they are available during the day, many VAs/contractors are still working day jobs and might not be available when you need them.)
- How do you accept payment (for us they must accept PayPal or we don't want to work with them.)

Reference Check

Good idea to check references!

- Talk to a client or two that they've worked with before (or currently)
- Ask to see portfolio/examples of past work
- References can be done by phone or email – depends on the person you are asking

Making the Offer

If it's an ongoing core team position:

- Date first! Agree to try a month or two before officially going to retainer
- Get a contract in place

If it's a project position:

- Generally doesn't need to be quite as official, but do clarify details such as timelines, payment terms, etc.

Last but not least – the most important element in hiring IMO...



Pay attention to your gut! (it's always right)

The Art of Delegation

The OBM's mantra:

Let it go... Let it go.... Let it go.... ;)

Shifting from doing to delegating is probably one of the toughest elements of becoming an OBM

What fears typically arise for the OBM when thinking of letting go?

“No one can do this as well as we can.”

“It's easier for me to do it myself than to explain how to someone else.”

“I don't have time to train anyone.”

Thinking of delegation as a long-term investment makes 'letting go' easier. I.e. by spending time and energy upfront to train someone, you ultimately free yourself up for other projects by getting it off your plate.

What to delegate?

- Anything administrative
- Any regularly scheduled items
- Customer service
- Website updates
- Ezine broadcasting
- Teleclass management
- Membership management
- To name a few...



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Training

As the OBM, part of your job is training. When you have contractors outside of an office setting it's easy to forget that they may not feel like they're 'a part of things'. People can fall between the cracks. Training can alleviate this and be an integral part of team building as well as a investment in your business. How do you do this?

- Give them a tour of the business
- Introduce them to other team members (via email, weekly call, etc)
- Give them access to (and a tour of) the SOP guide
- Have them shadow you (or whomever) – this can be the best way to train anyone. For example, when you respond to your emails with a particular client you can 'bcc' the person being trained to give them an idea of how you want them to respond to clients with tone, content etc. Doing this can also give the person being trained a sense of empowerment.
- Make it VERY clear that you want them to ask questions upfront vs. struggling. This is one of the most common issues when bringing someone new onboard. This can save a bunch of time, energy and frustration on all sides.

Managing the Team

- Give clear tasks & goals
- Put a deadline (even a false one) on everything! (or it won't get done – Parkinson's Law – *the task at hand will expand to fill the time allotted it*)
- Default to over-communicating – in many ways there is no such thing as over-communication, especially online (via email for example) you can always just hit 'delete'. By taking initiative and giving people the heads up by saying, 'I will over-communicate' it will encourage others to follow your example (and you – and your team – benefit).
- Keep core members plugged into the bigger picture – weekly meetings
- Nag, Nag, Nag



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What motivates you?

Typical examples include - getting paid, loving what you do, seeing a project come together, taking on new (big) challenges, the creative process, ego gratification, not being “bored”.

Keeping the Team Motivated

- Challenging work (learning). This gives people the opportunity to stretch and grow in to new roles.
- Freedom/independence
- Recognition for their work – a simple thank you goes a long way!
- On retainer for a certain number of hours each month (they will likely be more committed to you if you can commit to them)
- Being paid well
- Respect for company/biz owner
- Creating win-win situations by making referrals to contracting *superstars* and watching their businesses grow (and make referrals back to you!)
- Fun!

Handling Team Challenges

Situation 1:

You’ve repeatedly asked members of your team to update the SOP and they just aren’t doing it. You’re not sure how to get them to do it and you’re getting frustrated!

Typical reasons why people are resistant to SOP’s include: being too busy, they don’t ‘get’ the importance of it, it’s not a priority for them, it feels too restrictive, they lack confidence in their ability to write or it’s just not fun.

How do you make it easier to ‘get buy’ in for the SOP guide?

Think of the challenge as a ‘coachable moment’. Ask the question, ‘how can I make it easier for them to get it done?’. By doing this you focus on discovering what’s in it for them which can make it easier to motivate them.



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Instead of waiting for someone to get back to you with writing a forward for your book, for example, simply ask the question, “What can I do to make this easier?” With a quick 10 minute phone call, and an offer of ‘you talk, I write’ it can lead to a quick draft ready for publication. Approaching people with a sense of curiosity instead of focusing on the frustration can quickly lead to solutions.

It’s tough because the SOP guide ultimately benefits the OBM the most. So it’s up to you to make it happen.

Handling Team Challenges

Situation 2:

You’ve ‘inherited’ working with a web designer who is already on the team. This person is a control freak, always wants to do things his way and keeps you shut out. You are working on a Wordpress project and despite many assurances, you find out at the last minute that he hasn’t done anything that was promised and you now have to scramble to complete the project on time.

How to prevent something like this?

Typical solutions may include:

- A simple, frank conversation with the business owner to keep them in the loop.
- Dealing with the project deadline first, then following up with the business owner (and perhaps the contractor) to discuss what went wrong and how to avoid it in the future. Best to do this promptly – within 24 hours.
- Documenting your efforts and actions by leaving a paper trail to share with the client if needed. Documenting the facts can help keep the emotions out of things.
- This contractor may not know what the OBM role actually is and feels threatened or jealous. If you don’t have the backing of the client it’s easy for people to get feathers ruffled.

Using the ‘three strikes’ rule is a good rule of thumb in a case like this. Once they let you down three times it’s time to re-evaluate – don’t let it keep dragging on into 4,5, 10 strikes! This needs to be handled diplomatically as this person may have all the passwords, hosting information, etc. Exercise caution and keep the client in the loop.



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It helps to have the backing of the business owner and to be clear about what your authority as OBM is as well as what your responsibilities are – having the responsibility without the authority can put the OBM in an untenable position.

A contrarian approach:

It's either solvable or it's not.

If it's not solvable...

It is not the role of the OBM to make a project out of helping this person fit on the team. The true coaching approach in this situation would be to not make the effort to solve things other than letting *them* have an opportunity solve it.

With this approach it's about not pushing; it's about having that person come to you if it's worth it to them. If not, it's done. It's possible to be committed to the result yet detached from the outcome.

Possible role play

OBM - "Hey, (web designer/WD) I'm so-and-so and I've been hired as the OBM. I understand you have several projects. Can you bring me up to date?"

WD response.

OBM – Great. What are your deadlines?

WD response.

OBM – Great. What are your next steps?

WD response.

OBM - Okay. Please copy me and the business owner on delivering that next step on that date. I should let you know I'm a lover of deadlines. If we're not able to make that deadline we need to get on the phone and we can renegotiate, but you know this is a priority project so I'm going to be keen to make sure we make that deadline. I understand that web design is a tough thing, but apparently there have been delays on your design work before. I'm the new kid on the block and need to make things happen.



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The above script accomplishes a number of things. It clearly communicates expectations. It's fair, reasonable and over-communicated. The designer gets that 'there's a new Sherriff in town.' It's clear that if the deadline is not met it won't be ignored like before. It's like communication *judo* as opposed to communication *boxing*.

If deadline not met the script could go something like this (via phone or email):

OBM – So, we missed our deadline and we are looking into new alternatives. We'll be meeting (OBM and business owner) about what to do with the project. If you think you have a solution where it can be solved on your end I'm all ears. Otherwise, we'll let you know how we plan on going forward.

This dialogue is fair and reasonable. **Their job is to solve a problem not be the problem.** If they are being the problem they are already costing time, energy and money. The only time it's unfair is if you don't communicate.

If client is aware of what is happening and still doesn't want to let them go (and you still want to work with the client) it's always possible to say something like:

"It's not working and you want to give them a chance. I understand. That is compassionate etc. As the OBM I'm the advocate for your business and this person is costing more money than the actual dollar amount we are paying him. What I want is to protect the business. So, here's what I suggest. I'll stay out of this part of the process. When the design is ready pass it on to me."

Keep in mind that if the client insists on keeping this designer on board that can be a red flag and a harbinger of things to come. As OBM's we have a tendency to take on too much responsibility. In the above case it may make sense to wish them well and walk away, although we invite you to not take that approach to quickly as this may be a growing moment for the client and the business.

It can be difficult to communicate clearly and calmly in this situation due to lack of experience or a fear of something. It can be easy to begin practicing by saying something slightly different with the little things in life. Stating your contrarian opinion often just requires a little bit of confidence that comes with experience.

If you're in this scenario – trying to have this conversation with a real live person – where is the 'ick' energy coming up or the "OMG, I can 't do that..."?

It can arise when your role (or the role of others) is not clear. In that case, being challenged, it may be difficult to know where to go from there. Once you understand your role and authority it makes it easier to assert yourself in all situations. Knowing that you are going to be 'backed up' by the business owner frees you up to do what you do best. It helps to go into any situation with the client thinking, 'I am here to make sure your business thrives.'



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Be a diffuser instead of an igniter.

The real value the OBM brings to the table is the ability to think even more clearly than the owner about the business. To keep emotions out of the situation and look to solve situations and move things forward. It's not the job of the OBM to be the 'yes' person. Although the business owner benefits from the relationship with the OBM ultimately, the OBM is here for the business, not the business owner.

The business owner is part of the team, so when you are managing the team you are managing the business owners too!

Tips for Dealing with Challenges

- Open up a discussion w/o emotion
- Ask the person how they would like to fix/change the situation
- Look for room to grow/expand within the challenge (for all concerned)
- Consider how you would approach it differently next time
- If need be, don't be afraid to cut the person loose! (fire them)

Mastery Exercises & Questions

Another situation for you to consider... how would you handle this?

A member of your team is constantly late with deadlines. You've talked about it multiple times already and they've promised to be on time yet are still consistently late. Love this person and they do great work (when they get it done) - what to do?

Consider other challenging situations that you've faced, how would you approach them differently? What would you do next time?

