



Buy Back Your Time (Part 3):

Effective processes for managing your assistants are key to getting the best work from them.

You’ve made a good hire, your next task is to make sure you’ve got effective processes for onboarding and managing them.

Most small business owners go wrong by not setting their assistants up for success, with unclear processes, and expecting them to figure out too many things for themselves.

There are 5 key areas:

- 1) Onboarding
- 2) Training
- 3) Communication
- 4) Tools
- 5) Potential Challenges To Be Aware Of

How to use this Worksheet: type this up on a separate document (or grab a pen & paper if you wish) + answer the Q’s below.

STEP 1: ONBOARDING
• Walk your assistant through each of the key tasks/projects you want them to complete (I would use Loom to record the screen and show them - that way they can watch it back in the future) • Give them access to relevant tools (e.g. the software they will use). Make sure they know how to use the key features they need to complete their tasks. Lastpass is a good tool to use for sharing passwords with them securely. • Show them where to find instructions/SOP’s (Notion or Google Drive are good places to organise documents into easy to locate folders). • Explain how they should ask for help. FYI - culturally Philipinos generally hate looking stupid, so don’t tend to like asking for help. Explain clearly that it’s OK to ask for help, that they can come to you, search online for answers etc. Tell them the worst thing they could do is disappear (if they get stuck and don’t know how to move forward they can sometimes ghost you as this can be preferable to looking stupid - which you obviously want to avoid)

STEP 2: TRAINING

There are 3 methods I'd use for training your assistant:

- 1) Loom Your Work
- 2) The Repeat Back Method
- 3) Clear SOP's

1) Loom Your Work:

- One of the fastest and most effective ways to train your assistant on how to complete a task is to use Loom (a screen recording tool).
- Turn Loom on and record yourself (or whoever is delegating the work) and complete the task. As you're doing the work, explain (speaking to the camera) and explain what you're doing and why you're doing it.
- Don't waste time striving for perfection. Have the mindset of how you'd explain things in a meeting. Do it in one take. Silences, "ums" etc are fine.

2) The Repeat Back Method:

- Share the Loom recording with your VA.
- Ask them to complete the task themselves using Loom, recording their screen whilst they complete the task.
- Once they've completed it, they share the Loom recording with you.
- Review their recording and make sure it's been done correctly.
- Give them feedback via a new Loom recording.
- If there's mistakes (likely at the start - but should quickly reduce with this method), ask them to repeat the task and this process (sending the Loom recording) until you're happy they've understood and completed the task correctly.

3) Clear Standard Operating Procedures (SOP's):

- SOP's are key for biz to be "franchise ready" (scalable, sellable or exitable).
- Tasks will get done "right first time" more often than not when key processes are documented.
- If you don't have SOP's, get your VA to create them for you (and make them responsible for keeping them up to date)
- Notion is a great tool for organising processes
- For all key processes have 4 parts to the SOP:
 1. Loom recordings (how-to videos)

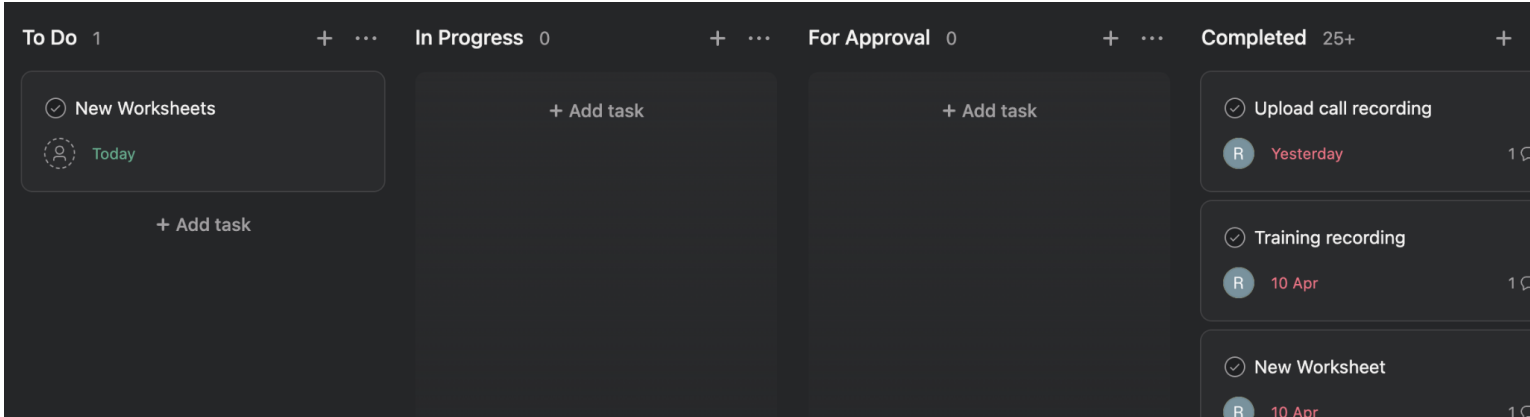
- 2. Step by step instructions (in a Word or Google Doc)
- 3. Checklist (to make sure key steps in the process are reviewed and covered)
- 4. Clear standards (how often should it be done, by when, how should they communicate)

STEP 3: COMMUNICATION

- Be clear on what channel you want them to communicate with you on (e.g. email, Whatsapp - pick one)
- Set clear expectations around tasks (use a tool e.g. Asana to assign tasks + deadlines)
- Give clear feedback (Loom is an efficient way to do this)
- Give them a task to complete an end of day check-in. Make this their responsibility, it also gets around them not liking to ask for help. Ask them to report to you with:
 - What did you get done today?
 - What issues did you come across today?
 - What can I help you with?

STEP 4: SUMMARY OF USEFUL TOOLS

- Screen recording: Loom is good for walking through how to do tasks and for giving feedback
- Storing and organising SOP's and instructions: Notion, Google Drive
- Lastpass: for storing and sharing passwords/logins
- Project management: Asana is good for assigning tasks and deadlines. You could set up a board, similar to the one below:



STEP 5: POTENTIAL CHALLENGES

- Internet: it will go down now and then. Have a plan for when it does (e.g. set deadlines the day before they're due)
- Natural disasters are a possibility. Again set deadlines in advance of when you need the work to allow for this.
- Boredom: if they get bored they'll look for more work. Keep them busy. If they're not busy, tell them to take some time off. Or share in the Unbound group to see if any other members want to share capacity.
- Full-time jobs are highly desired. Bear this in mind if you're hiring part-time staff as they will be working on other projects.

WHAT ARE YOUR KEY TAKEAWAYS / ACTIONS - BY WHEN?