

GET A GREAT ASSISTANT

GUIDEBOOK



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The Promised Land

Fellow Entrepreneur,

Earlier this year I finally reached “The Promised Land.”

An 8-day vacation in Hawaii with no phone, no meetings, and - best of all - NO EMAIL.

Even better?

When I came home, there were only 25 emails in my inbox. No “welcome home” avalanche of 500 messages.

My secret?

Her name is Sarah.

She’s been my Executive Assistant for over two years now.

Sarah handles tons of my day-to-day tasks like my email inbox, scheduling appointments (such a life-saver), and even personal items like booking my house cleaner and organizing dinner parties.

It took 7 years and dozens of failures before I cracked the code on how to find the Sarahs of the world.

In fact, one mistake I made even cost me \$10,000 in just 3 months.

(I still cringe when I think about it.)

But now that I’ve got it figured out my life has changed forever.

I’ve even helped a dozen other entrepreneurs find their own Sarahs too, and - ultimately - their own, newfound freedom.



Me with Sarah and her husband Pete. After working together virtually for over a year, this was the night we met in-person for the first-time ever.

In this Guidebook I provide a variety of samples, templates, examples, and answer the most common questions I get asked about getting a great Assistant.

You're Probably Wondering

You probably have many of the same questions I had:

- Can I afford an Assistant?
- Can I trust an Assistant?
- How do I let go of control?
- I don't have time to train an Assistant!
- Do I have enough work to keep an Assistant busy?
- Where do I find a great Assistant?

These days I cruise full-tilt with Sarah.

You might be thinking, "Oh, it's makes sense. He charges \$500/hr, *obviously* he's got an assistant."

You might think I made it to \$500/hr, then hired Sarah.

Au contraire.

I made it to \$500/hr because I hired Sarah.

When I hired Sarah, I was charging clients only \$40/hr for my consulting services.

Then, because Sarah took so much of the \$10 - \$20/hr work off my plate, I was able to focus on higher-level tasks, steadily increasing my hourly rates along the way.

One of the fastest ways to get yourself up into the \$100 - \$5,000/hr work is to hire an A+ Executive Assistant.

Hopefully Mike and I's podcast on *Self-Made Man* can help you learn from my mistakes and shortcut your way to the top!

Onwards and Upwards,

Tim :)



8 Magical Days in Hawaii (July 2015): no phone, no email. My Great Assistant kept things running while I relaxed and recharged. When I came home? No “welcome home” avalanche of 500 emails. Just 30 mins spent answering the 25 messages Sarah needed me to deal with.

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Feels Like Magic

It was 10:30am on a crisp Fall day up here in Edmonton, Canada.

I was cruising to the University of Alberta to attend my sister's convocation.

I booked off the whole day - no meetings, no work.

Excellent.

Suddenly I saw this text from Mike Dillard:



Shit.

Somewhere along the way Mike and I had miscommunicated. I thought his podcast episode with me would go live *next* week.

Now I had only 90 mins to:

- setup a landing page on ProfitFactory.com
- create and embed an Infusionsoft opt-in form
- setup Infusionsoft tags
- map Infusionsoft sequencing
- write and format a "welcome" email in Infusionsoft

My Mom was next to me in the car, my laptop was miles away at home, and it was clear this graduation was a once-in-a-lifetime family event so there was no turning back or skipping out.

Old me would been *screwed*.

But the New me texted Mike, “Let me see what I can do.”

Sarah to the Rescue

I dropped my Mom off, parked the car, and called my Assistant Sarah.

Thankfully she was available.

In about 5 mins I gave her clear instructions on what I needed done.

(If you’re familiar with Profit Factory: I used “360 Delegation.”)

While Assistant Sarah got to work, I went inside, saw my sister and congratulated her on her big day.

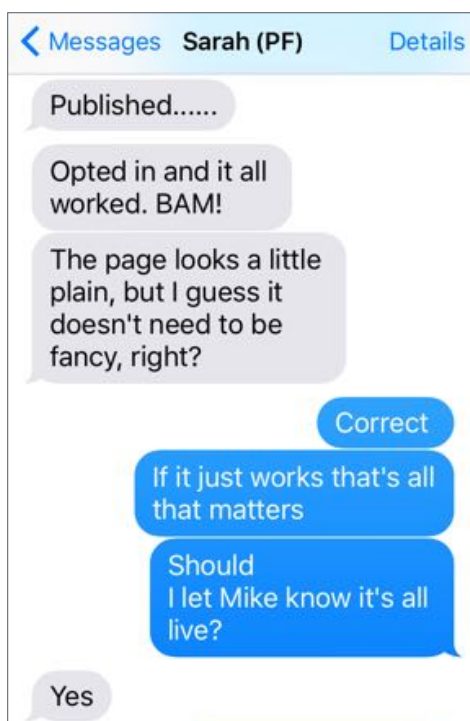


My family and I checked our jackets, grabbed a few refreshments, then found our seats in the auditorium.



As I took my seat, my phone buzzed again.

It was Assistant Sarah with an update:



I grinned from ear-to-ear.

Within 45 mins everything was done and live.

Simply Amazing.

Rent-an-Assistant is Just Wrong

There's absolutely no way Sarah could have nailed everything with such incredible speed and perfection had she been a "rent-an-assistant" from Zirtual.com, AssistantMatch.com (or similar services).

She simply wouldn't have the tools, skills, insights into me and my business that come from months and years of dealing with me and focusing exclusively on my business.

"Rental Assistants" have multiple clients, allocating you a few hours per week or month.

As such, they're perpetually switching between you and their other clients and projects.

Tons of time and energy (and your money) is wasted in “changeover” as their brains have to switch back into your business everytime something needs to get done.

You’re also competing for their attention against their other clients. “Get in line” and wait for your work to get your work done.

With such distraction and diffusion it’s extremely hard to hit Compound Interest, the tipping point where your Assistant provides massive ROI (Return-on-Investment).

Many Entrepreneurs suffering from this often conclude, “Managing this Assistant is too much work; I’ll just do it myself.” Back to feeling stuck on the front lines of business.

The Compound Interest of “Owning” Your Assistant

Reminds me of the old riddle:

Would you rather take a penny that doubles in value everyday for 30 days, or a Million dollars now?

First time I heard this, my gut reaction was: “Million Dollars NOW!”

But then I did the math and was stunned to discover...

Day 1: \$.01	Day 12: \$20.48	Day 23: \$41,943.04
Day 2: \$.02	Day 13: \$40.96	Day 24: \$83,886.08
Day 3: \$.04	Day 14: \$81.92	Day 25: \$167,772.16
Day 4: \$.08	Day 15: \$163.84	Day 26: \$335,544.32
Day 5: \$.16	Day 16: \$327.68	Day 27: \$671,088.64
Day 6: \$.32	Day 17: \$655.36	Day 28: \$1,342,177.28
Day 7: \$.64	Day 18: \$1,310.72	Day 29: \$2,684,354.56
Day 8: \$1.28	Day 19: \$2,621.44	Day 30: \$5,368,709.12
Day 9: \$2.56	Day 20: \$5,242.88	
Day 10: \$5.12	Day 21: \$10,485.76	
Day 11: \$10.24	Day 22: \$20,971.52	

Thus, the magic of **Compound Interest**.

No wonder Albert Einstein said:

“Compound interest is the eighth wonder of the world. He who understands it, earns it ... he who doesn’t ... pays it.”

In the beginning, Compound Interest is extremely boring.

One penny doubling to two pennies? *Meh.*

After two weeks it's *still* really boring: \$41 becomes \$82.
The million bucks up-front *still* looks better than the doubling penny.

But then a tipping point hits towards the end of the 30 days. From Day 26 - 28 you go from \$335K to \$1.3M, finishing on Day 30 with a cool \$5.37M.

DAMN.

The same is true in your relationship with your Assistant.

The first few months are usually a drag. You're spending tons of time training, familiarizing, teaching, connecting to resources. More than once you'll probably think, "I should just do this myself!"

But then you hit a tipping point where magically your Assistant does things on their own and you start feeling the momentum.

Within a few months they're taking big chunks of work off your plate, and you start wondering how you ever lived without them.

This is possible when you view your assistant as a long-term, appreciating asset.

The Right Kind of Assistant = Long-Term Freedom

I am Sarah's only client.

Over the past two years she's become used to me, my business.

She knows our tools (including Infusionsoft).

She has all my logins, LastPass access, credit card, everything to swoop into action.

She knows all our approved vendors she can hire whenever we need work done.

She's earned my trust over 2+ years.

She can now anticipate many of my needs, preferences, nuances.

Sarah and I have invested into each other for the long-term. We now enjoy the Compound Interest of our ever-strengthening relationship.

Possibly the most important tip in this entire guide: commit to finding an Assistant who is YOURS, and invest in them so they will stay with you for YEARS.

If Sarah had 5 clients, or only worked 1 hour a week for me, we wouldn't be investing enough time and energy into each other to actually get any speed or leverage.

I've often heard that a space rocket will use over 80% of it's fuel just in takeoff. Once it orbit, very little fuel is needed.

Your Assistant is the same way. You need to spend enough up-front time and energy (and possibly money) with your Assistant to get them "launched."

And while launching them, they need enough hours working in your business to get the hang of things.

With all of that in mind, let's tackle the 6 Most Common Questions Entrepreneurs have about Getting a Great Assistant.

The Big Questions

1) Money

When I first hired Sarah, I was making \$40/hr from my consulting clients.

As Sarah took over more and more \$10/hr - \$20/hr tasks, I was able to focus on the \$50 - \$5,000/hr tasks. My rates increased.

Today I charge \$500/hr.

Most people assume I reached \$500/hr, *then* hired Sarah.

Just the opposite is true. I reached \$500/hr *because* I hired Sarah.

The most common money-related questions are:

- How much should I pay?
- What if I can't afford to pay a full-time salary?
- How do I make an Assistant profitable for me?

Let's tackle each of these.

How Much Should I Pay?

\$15/hour to start, then go up as you see fit.

At \$15/hour you're slightly higher than the \$10-\$12/hr often offered by most other employers, thus giving you a better pool of applicants to choose from.

I can't believe it when I see rent-a-VA services like Zirtual charging \$40/hr. Unless the Assistant is running department meetings and doing first-round negotiations for you in your \$25M+ company, \$40/hr is pure insanity.

The other extreme is just as ridiculous.

If you pay \$5/hr for help, you're getting someone overseas, under-skilled, or both. I guarantee you will get sucked into fixing all kinds of errors and sorting out miscommunication. You *think* you're paying \$5/hr, but factoring the value of your time (probably \$50/hr+), \$5/hr workers are often the most expensive of all.

I've tried \$5/hr - \$10/hr in India, Pakistan, and the Phillipines, and it *always* turned out poorly.

What If I can't Afford a Full-Time Salary?

No problem.

I had this exact issue when I started with Sarah.

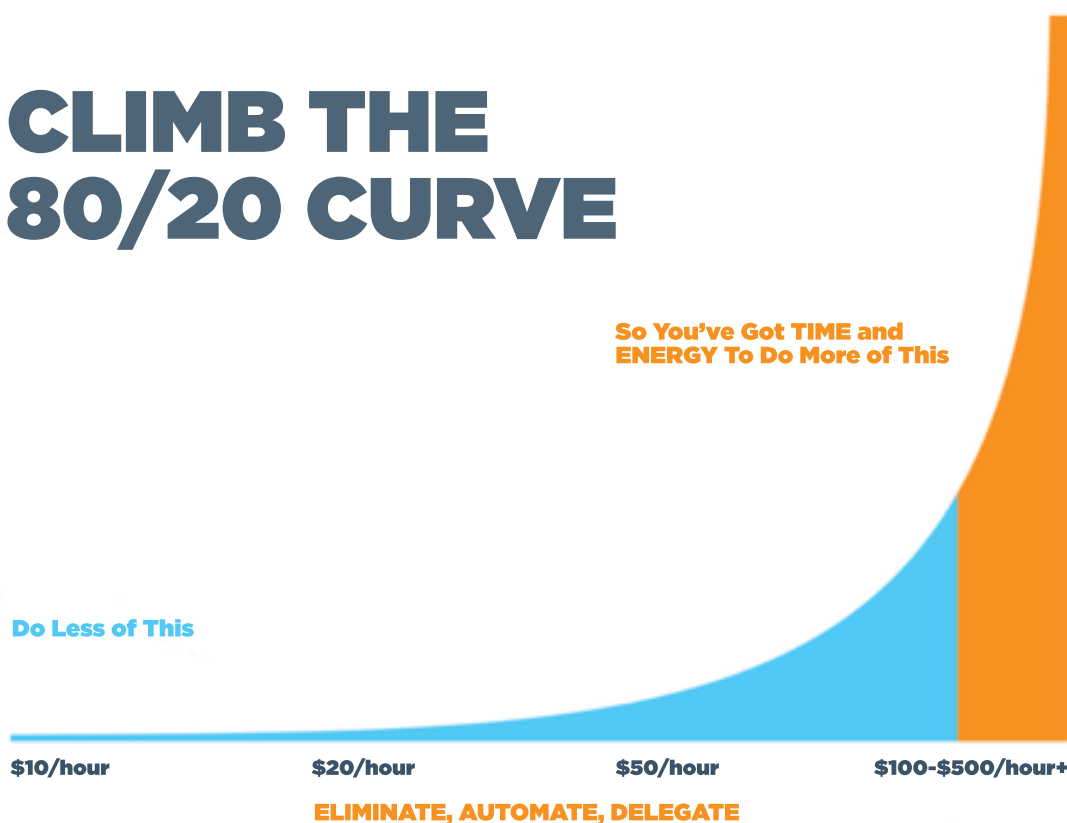
We began with only 5 hours per week. At \$15/hr, that meant only (approx) \$300/month.

If you can't afford \$300/month, then you shouldn't get an Assistant. You've got other issues to tackle first. Namely sales and/or reducing unnecessary expenses.

How Do I Make an Assistant Profitable for Me?

It's all about "Climbing the 80/20 Curve." Thank-you Richard Koch and Perry Marshall for drilling into my brain...

CLIMB THE 80/20 CURVE



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List all the tasks you do in a day. Estimate the per-hour value of each. Organize them from most-valuable to least-valuable and you'll quickly see the bottom-80% are \$10/hr - \$50/hr tasks, while the top 20% are worth \$500 - \$5,000/hr.

When you get a Great Assistant, you'll identify, then delegate the Bottom-80%, piece-by-piece, until you're doing only Top-20% work.

This is exactly how I went from making \$40/hr to climbing to \$500/hr.

If you can't figure out how to do more high-paid work (selling, marketing, consulting, etc), then it's too early for you to get an Assistant - don't get one.

2) Control and Trust

Before I had my Assistant, I was stuck doing everything myself.

I wondered how I could ever trust or let go of control. I repeated the classics again and again:

- “Can an Assistant do it as well as me?”
- “What if she makes a mistake?”

And, of course, the world-renowned, “It’s faster if I just do it myself!”

Opportunity Cost

What I wasn’t considering was the Opportunity Cost. By clenching so tightly to control, by being skeptical and cynical around trust, ***what was I missing out on?***

This past year has answered that. Because I trusted Sarah to run much of the day-to-day, I’ve been free to take advantage of the following Top-20% opportunities...

An Unforgettable 12 Months

New York City (twice)

- Speak at NYU
- Private “Boardroom Dinner” w Brian Kurtz
- Empire State Building
- See *Wicked* on Broadway
- Carnegie Hall - NY Pops Orchestra
- Tour of NY Public Library
- Times Square
- One World Trade Centre
- Skating at Rockefeller Center
- Dancing on “Big” Piano at FAO Schwartz
- Atlas Statue
- Trump Tower
- Stroll Central Park
- Speak at WeWork Charging Bull
- Walk Wall Street

Chicago (twice)

- Chicago Symphony Orchestra
- Millennium Park
- Cloudgate
- Chicago Bulls NBA game
- Chicago Blackhawks NHL game
- Willis Tower (formerly Sears Tower)
- Navy Pier
- Certification course, *Scrum Product Owner*
- Shopping on Magnificent Mile

Jamaica

- 10 days on-resort in Negril, Jamaica
- Sailing
- Catamaran Cruise
- Deep-sea fishing

Hawaii

- Snorkel Molokini crater
- Drive Road to Kihei
- Sunrise at Mount Haleakala
- Hike Waimoku Falls
- Old Lahaina Luau
- Golfing
- wedding at Sugarman's Estate

Phoenix

- Take Kolbe Certification course
- Tempe Town nightlife
- Bike Tempe Town Lake and ASU Campus

San Francisco

- Bike Golden Gate Park and Haight Ashbury
- Golden Gate Bridge
- Attend *Entrepreneur Mastermind 1*
- Walt Disney Family Museum
- "Full House" houses
- Oakland Athletics baseball game
- Chocolate tasting party in Marin
- San Francisco City Hall
- Motorcycle tour of PCH1

Austin, TX (3 times)

- 4-day wedding at *The Wizard Academy*
- Attend Keith Cunningham's *4-Day MBA*
- Tour of Texas State Capitol
- 6th Street Nightlife (too many nights!)
- TopGolf Austin
- Attend *Entrepreneur Mastermind 2*
- Consult at Simply the Coolest

Summit Mountain, Utah

- Attend and speak at *Baby Bathwater* event
- Relax at Summit Mountain resort

Calgary, Canada

- Bobsled down Olympic Track
- Bicycle tour through Prince's Island Park
- Consult at Vergie Speed

Edmonton, Canada

- Tour Fort Edmonton Park
- Tour Alberta Legislature
- West Edmonton Mall
- Consult at Mindable

Vancouver (4 times)

- Bike Stanley Park
- Stroll Granville Island
- Coal Harbor Dinner Cruise
- Tour Olympic Cauldron
- Attend Strategic Coach (quarterly)

Canadian Rockies (5 times)

- Relax at Banff Springs Hotel
- Banff Upper Hot Springs
- Banff Gondola
- Host my event, *The 80/20 Retreat*
- Hike Moraine Lake
- Hike Consolation Lake
- Hike Lake Louise
- Relax at Chateau Lake Louise
- Relax at Jasper Park Lodge
- Annual family trip

Do the Big Things

Author Tim Ferriss shares this gem:

*"Oftentimes, in order to do the big things, you have to let the small bad things happen."
- Tim Ferriss*

If you want a 100% guarantee your Assistant will never make a mistake, thats impossible.

In fact, I can give you a 100% guarantee your Assistant will make errors.

But the errors will probably be fewer than you expect.

And the new-found freedom you have to focus on the "big things" in life will be mind-blowing.

6 Tips to Avoid Risk When Delegating

Apparently Warren Buffett always asks three questions when considering an investment:

"What's the upside? What's the downside? Can I live with the downside?"

When choosing what to delegate, start with repetitive tasks which have little downside.

Better for your assistant to make a mistake filing documents in Dropbox folder than sending the wrong broadcast to 50,000 email subscribers.

Usually prevention and "downside management" are your two best friends.

1. Criminal Record Check

Do a police / state / provincial criminal record check. Usually costs between \$20 - \$50. Some states allow you to do it online.

2. Wait to Handover Your Email Inbox

There's tons of tasks available for your VA - don't start with (arguably) the most sensitive, vulnerable, confidential task. Wait for (at least) a few months before handing over your email inbox.

This gives you time to vet your Assistant and build trust with them, while also minimizing the amount of training you need to do. Email is somewhat training intensive.

3. Wait to Handover Full Credit Card

Instead, give them prepaid credit cards. Or credit cards with really low limits.

4. Scale Up Authorization Over Time

When Sarah first started, I did **not** give her full Infusionsoft access.

Instead, I let her access the email broadcast feature. Then we graduated into building sequences. These days she does almost anything in Infusionsoft including process credit cards.

5. Be Patient

Remember this is a relationship with your Assistant; understand it takes time for your trust and relationship to grow.

Furthermore, remember that - not that long ago - you didn't know how to do these skills either. Yes it is possible for someone else to replace you.

6. Reference Checks

Interview the leader of a business or charity where she was responsible for money.

3) Tasks You Should Delegate

There's three categories of tasks your assistant can take on:

- 1) **General Admin:** the predictable stuff such as filing documents
- 2) **Managing You:** your inbox, calendar, travel, etc; this is probably new territory for you, expect it to feel odd in the beginning, but you'll quickly love it
- 3) **The Middle 80%:** you may not realize it, but most tasks you do can be unpacked into smaller pieces, many which can be passed to your assistant. For example, recording a podcast episode:
 - **You:** record audio, write show notes and copy.
 - **Assistant:** edit audio, export to WAV, upload to server, add show notes to podcast episode, create new blog post, add show notes to body, embed audio player to body, publish blog post, test blog post on 3 devices (iPhone, iPad, desktop) to ensure everything working, setup email broadcast to announce new episode, store audio files to proper Dropbox folder, write you to let you know everything's done and scheduled.

You do the first 10% of the job, then your Assistant takes it from there.

What Sarah Does for Me

Here's a partial list of tasks Sarah has done for me:

Email Inbox

- read all incoming email to delete junk / unsubscribe, and also tag crucial Tim-only emails for me to review and reply
- catch interview requests and schedule quickly
- setup meetings for \$500/hr clients
- handle customer service questions

Calendar

- Manage all appointments during business day; dealing with all the back-and-forth of scheduling
- Handling cancellations
- Ensure I have all meeting info (agenda, time zone, directions, other person's bio, etc) so I can open appointment and GO!
- Monitor who gets onto my calendar; blacklisted people never get on.

Website / Wordpress

- Create pages
- Upload blog posts
- Create Thank-You / Success pages
- Embed Infusionsoft forms for opt-ins
- Embedding videos and pics where needed.

Creating Systems

- Writing procedures according to our in-house method

- Organizing procedures properly inside Google Drive and Teamwork.
- Ensuring files get named to our protocol, then filed to the proper location in our online storage (we use Egnyte, not Dropbox)

Onboarding

- Copying, pasting, preparing our onboarding process for new hires
- Setting up all accounts new hire will need (email account, Convo)
- Sharing all Google Docs new hire will need

YouTube / Podcast

- Upload episodes
- Add show notes and tags
- Apply the right settings

Invoicing

- review all incoming invoices to make sure they're complete and clear, so I can pay them all at once (no back-and-forth hassle)

Client Care

- send flowers and greeting cards when our \$500/hr clients have life milestones (e.g. baby born)
- find out from clients what they're personal interests are so we can send gifts of appreciation

- buying and coordinating gifts on Amazon

Infusionsoft

- add a contact
- create an invoice
- setup checkout pages
- setup campaigns and sequences in Campaign Builder
- create & format emails for sequences and broadcasts
- schedule broadcasts
- run a credit card
- refund purchases

Kolbe Requests

- Receive test requests
- process payments
- allocate tests
- schedule consultation time for client w me
- pull Kolbe results for teams and create aggregated reports

Travel

- Booking AirBnb accommodations
- (Sarah not booking my flights at this time)

Paperwork

- Arrange for helper to come over and file receipts
- Arrange for helper to come over and open mail, file statements to filing cabinet

Members Area

- Upload webinar replays
- Add and format replay page
- Notify members of new replay via email
- Post new webinar to Facebook

Google Adwords & Facebook Ads

- Adding tracking codes and pixels onto our website
- Handle all admin issues including expiring credit cards
- Pulling reports as needed for internal analysis

Webinars

- Setup GoToMeeting / GoToWebinar
- Announce in our members area
- Announce on Facebook page
- Announce to email list

Dinner Parties

- Contact desired guests
- Distribute map to my house, including where to park
- Ensure no allergies or diet restrictions
- Distribute dress code and schedule

- Arrange for groceries to get delivered (by a friend we pay)

Event Planning

- Confirming dates w venue
- Confirming registration desk person
- Confirming videographer

- Confirming emcee to intro Tim
- Sending out event notices through Infusionsoft
- Posting event details to Meetup.com
- Posting event details to our Facebook page

- Doing post-event report so we know our Cost-per-Attendee

Personal

- Book housecleaner to come
- Book haircuts

4) Where to Find Great Assistants

Virtual vs. local matters less and less these days.

The most important factor is just that your Assistant is in your country or a (culturally) similar, neighbouring country. We need same / similar language, culture, time zone, and stability.

For example, if you're American, an Assistant from Canada would work great too. If you're Australian, then an Aussie or a Kiwi Assistant would work.

Avoid Cheap Labour Overseas

Philippines

I've tried the Philippines for \$5/hr. Total mess. They're the nicest people on the planet, which is their downfall. They were too hesitant to give (valuable!) critical feedback when we needed to improve.

The one time I had a Filipino who was willing to provide raw feedback, he had a shaky internet connection and the constant sound of 1978 Honda motorcycles ripping by in the background. Extremely difficult (and frustrating) to have a focused, productive meeting.

India

I've tried India for Assistant help, as well as tech contractors (coders, etc).

They tech contractors would say *anything* just to get the contract, then usually delivered the project way late, and way over-budget.

The Assistant was a wonderful person, solid English speaker, but suddenly disappeared for over a week. She didn't reply to any emails, Skype messages, nothing. She'd fallen off the grid.

Days later I suddenly received a flurry of emails. She was back!

Turns out the electricity to her neighbourhood got turned off because a political fight broke out. Turning off her neighbourhood's electricity was one politician's way of strong-arming a rival.

I canNOT tolerate that. I need to know my Assistant will be reliable, and they'll meet all the standards of a professional, Executive Assistant including reliable communication, electricity, and internet. And no chickens clucking in the background.

Time Zone

I've heard success stories of other Entrepreneurs beating the odds, finding amazing coders and designers overseas at bargain prices.

Even if that's you, it's not going to work for your Assistant. It's crucial your Assistant is in the same (or similar) time zone as you to handle daytime tasks (when needed) and available on a relatively similar schedule. You don't want your weekly meetings happening at 3am (for you or them).

A Surprising Source of Talent

I never considered hiring a Stay-at-Home Mom until I stumbled across HireMyMom.com.

It's now my #1 source for Assistants.

I came to discover Moms have a few major advantages.

They Won't Grind You For Top-Dollar

Moms' #1 priority is to be at home with their kids.

Give them that and they're usually happy to work for \$15/hr, even if they were making \$20/hr - \$50/hr in their corporate or professional jobs pre-kids.

Remember, it can be tough for Moms to find legitimate, flexible, from-home work.

Working online is very much the "Wild West," with lots of scammy "make money from home" opportunities polluting Mommy job boards.

They're Locked-In for at Least 1-4 Years

If you hired a college kid as your Assistant, you'd have no "insurance" they wouldn't leave in 6 weeks on the next Contiki Tour to Thailand.

Heck, *they* don't even know where they'll be in 6 months from now.

Moms on the other hand have a major, non-negotiable life factor that will keep them relatively stable, (relatively) local, and domestic for the next 1-4 years: *their kids*.

It dawned on me one day when Sarah sent me a pic of her kids playing in the back yard: "She's gonna keep playing with these kids at home, caring for them until they're both in kindergarten. I'm safe - Sarah isn't going *anywhere*."

The Wild West of online work affects us entrepreneurs too: we never know just how serious a Virtual Assistant is.

But if you hire a Mom, you've (at least) got the fundamental, systemic constraint of kids to know your Assistant won't be jetting off anytime soon.

Talent Right Under Your Nose

Many entrepreneurs are successful hiring Assistants from within their business. By that I mean: 1) when current team members refer their friends to apply; 2) emailing your own in-house customer list.

In either case, you've got major advantages. When team members refer their friends, you benefit from the phenomenon, "birds of a feather flock together."

When you advertise your job internally to your customer list, you're almost certain to get applications from people who already know your business and your product, and are excited to be a part of the great business team that produces the products they love.

If You Insist on Hiring Local

My clients who've insisted on hiring local have had good success with Craigslist.

Just know - for some unknown reason - different cities lean towards different online classifieds. In Austin, Texas, Craigslist is king. In Edmonton, Canada, Kijiji.ca rules the roost.

Make Them Jump Through Hoops

When they get hired, your Assistant will need to follow instructions accurately.

Start testing them for this ability, long before you hire them.

See (and use) the process I use. Just go here: <http://www.ProfitFactory.com/PerfectJobPosting>.

Always, Always, Always Give Them Kolbe Assessment

100% of everyone on my team has done their Kolbe "A" Index.

It's so important, I even make my consulting clients take the test so we know how to work together.

Buy your Kolbe "A" Index tests here: <http://www.ProfitFactory.com/Kolbe>. Buy the Kolbe "A" Index for your top, shortlisted, 2-3 best candidates. You'll want a Follow-Through score of 6 or higher.

5) How to Train Your Assistant

I'll be straight with you: training / onboarding a new Assistant is a **lot** of work.

It requires mapping out all the steps required for proper training, *plus* the assembling and writing of all supporting videos, screenshots, and procedures for training.

Below is a list of Onboarding tasks. There's a reason companies hire us to do this work for them: **it's scary!**

General Onboarding

General Onboarding is the first kind of training. It's all the basics they need to be on your team.

Tasks for You to complete before Onboarding can begin:

- setup Assistant's @YourCompany email address
- setup Assistant's Convo account
- setup Assistant's Teamwork account
- create a Google Drive doc for Assistant to input their Vitals (address, PayPal account for payment, etc)
- in GDocs, put all Assistant's training procedures into one folder, then share folder w new Assistant
- create Assistant's LastPass account
- share all required logins w Assistant via LastPass

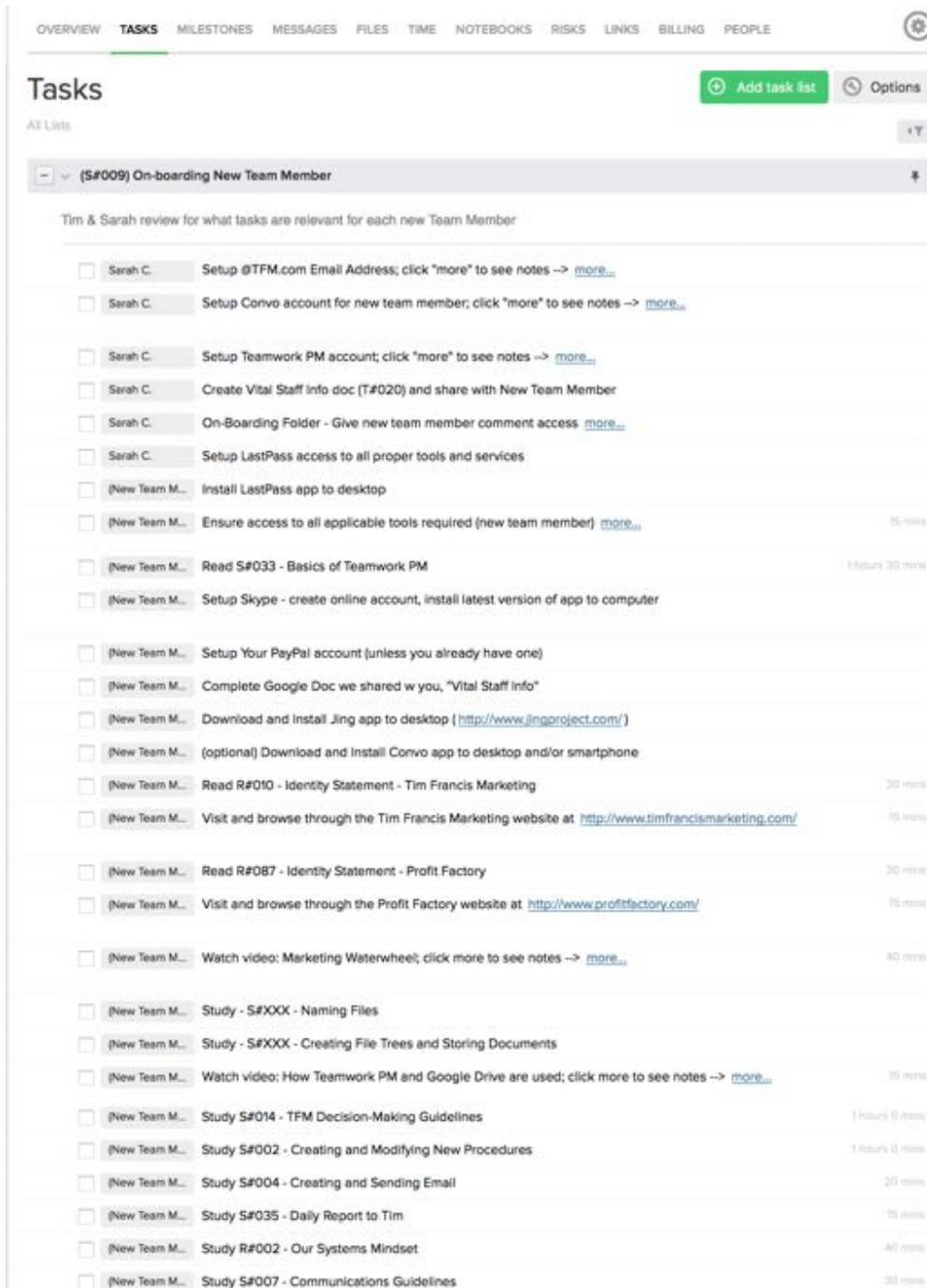
Onboarding tasks for new Assistant to complete:

- install LastPass to their computer
- ensure Skype installed on their comp
- setup PayPal account
- download and install Jing app
- download and install Convo desktop app
- Study video: Basics of Teamwork
- Complete GDoc, "Vital Staff Info"
- read company Identity Statement
- browse company website to familiarize with products, services, blog posts, free resources offered
- study any core models, frameworks, ideologies the company has built
- watch tutorial video on how Teamwork and GDrive are to be used together
- study Decision-Making Guidelines
- Study procedure: How to Write Procedures
- Study procedure: How to Create and send emails
- Study procedure: Daily Report
- Study procedure: Systems Mindset
- Study procedure: Communications guidelines
- Study procedure: Meeting Protocol
- Learn policy on handling invoices from vendors: rules and payment cycles
- Study procedure: Getting Paid

- Schedule and attend a virtual (or real) introduce yourself. “coffee date” with key team members to

Believe it or not, when we set this up inside of clients’ businesses, we can actually get new teammates through the entirety of Onboarding in **one day**. This means the new Assistant can hit the ground running within the first few days.

We organize all General Onboarding inside Teamwork. This allows the new Assistant to see everything they need to learn, plus allows them (and you) to track their progress along the way.



The screenshot shows the Teamwork interface with the 'Tasks' tab selected. The task list is titled '(S#009) On-boarding New Team Member'. The tasks are organized into sections: 'Tim & Sarah review for what tasks are relevant for each new Team Member' and a list of tasks for 'New Team M...'. Each task includes a checkbox, the assignee, the task description, and a 'more...' link. Some tasks also show estimated time durations.

Assignee	Task Description	Duration
Sarah C.	Setup @TFM.com Email Address; click "more" to see notes -> more...	
Sarah C.	Setup Convo account for new team member; click "more" to see notes -> more...	
Sarah C.	Setup Teamwork PM account; click "more" to see notes -> more...	
Sarah C.	Create Vital Staff info doc (T#020) and share with New Team Member	
Sarah C.	On-Boarding Folder - Give new team member comment access more...	
Sarah C.	Setup LastPass access to all proper tools and services	
(New Team M...)	Install LastPass app to desktop	
(New Team M...)	Ensure access to all applicable tools required (new team member) more...	15 mins
(New Team M...)	Read S#033 - Basics of Teamwork PM	1 hour 30 mins
(New Team M...)	Setup Skype - create online account, install latest version of app to computer	
(New Team M...)	Setup Your PayPal account (unless you already have one)	
(New Team M...)	Complete Google Doc we shared w you, "Vital Staff Info"	
(New Team M...)	Download and Install Jing app to desktop (http://www.jingproject.com/)	
(New Team M...)	(optional) Download and Install Convo app to desktop and/or smartphone	
(New Team M...)	Read R#010 - Identity Statement - Tim Francis Marketing	30 mins
(New Team M...)	Visit and browse through the Tim Francis Marketing website at http://www.timfrancismarketing.com/	15 mins
(New Team M...)	Read R#087 - Identity Statement - Profit Factory	30 mins
(New Team M...)	Visit and browse through the Profit Factory website at http://www.profitfactory.com/	15 mins
(New Team M...)	Watch video: Marketing Waterwheel; click more to see notes -> more...	40 mins
(New Team M...)	Study - S#XXX - Naming Files	
(New Team M...)	Study - S#XXX - Creating File Trees and Storing Documents	
(New Team M...)	Watch video: How Teamwork PM and Google Drive are used; click more to see notes -> more...	15 mins
(New Team M...)	Study S#014 - TFM Decision-Making Guidelines	1 hour 0 mins
(New Team M...)	Study S#002 - Creating and Modifying New Procedures	1 hour 0 mins
(New Team M...)	Study S#004 - Creating and Sending Email	20 mins
(New Team M...)	Study S#035 - Daily Report to Tim	15 mins
(New Team M...)	Study R#002 - Our Systems Mindset	40 mins
(New Team M...)	Study S#007 - Communications Guidelines	30 mins

Task-Specific Onboarding

Once your Assistant has all the basic, general training to be on your team, next they need task-specific onboarding.

This requires you to think about what tasks they're taking off your plate.

Earlier in this document, in the section "3) Tasks You Should Delegate", you'll see tons of examples of Tasks Sarah needed training in, such as Infusionsoft, Email inbox management, and Wordpress.

There's three ways you can get this training and pass on to your Assistant:

- 1) **Create it yourself.** Use screen capture software such as Screenflow (For Mac) or Camtasia (for PC). Record yourself doing the task, then share with your Assistant.
- 2) **Find online.** There's TONS of training (especially for software / SAAS tools) on YouTube. Search "Screenflow Tutorial" and you'll see many YouTube results pop up. Also consider searching Udemy.com and Lynda.com.
- 3) **Vendor training.** Sometimes the vendor will offer video tutorials. For example, Aweber and Infusionsoft have pre-built tutorials on all the basics. Why reinvent the wheel? Furthermore, if the software ever changes, the software company will automatically update the training videos, saving you tons of time / energy / money from re-shooting everything.

6) How to Manage Your Assistant

The goal is freedom. To spend all day monitoring and managing an Assistant is both tiring and counter-productive.

Instead of chasing your Assistant every day, flip the situation around by having them report to you every day.

Daily Report

Require your Assistant submit a simple email (or Convo* message) with answers to the following questions:

1. What did you do today?
2. What roadblocks and bottlenecks did you run into?
3. What are you planning to do tomorrow?
4. Did you log your time in Teamwork**?

Your Assistant is only required to submit these reports on days they work for you.

As you trust them more and more, it's okay if you don't always read their Daily Reports.

Nonetheless, still keep the reports coming. That way your Assistant knows you could (at anytime) be reading some / all of their reports. This causes them to be far more accountable.

** = Convo is the in-team communication tool we use and recommend; it's better than Slack.*

*** = Teamwork is the project management software we recommend ([click here for more info](#)); it has a feature for team members to track their time, which is great for month-end invoicing.*

Weekly Meeting

I have a standing meeting with Sarah, usually Monday nights.

We follow this agenda:

- **Good News (5 mins)**
 - Sarah
 - Tim
- **Reporting (20 mins)**
 - This Quarter's Metrics
 - Sales

- Accounts Receivable
- List Size and Growth
- Sarah's Dashboard (incl. emails in inbox, errors, core value moments)
- This Quarter's Priorities
 - Tim Personal
 - Internal Operations
 - Client-Facing Projects
- Quick Hits
 - Beefs & Bouquets from Clients
 - Beefs & Bouquets from Teammates
- Sarah's 80/20 Ideas
- Sarah's Dream Dollars Account
- To Do List Review
 - Sarah
 - Tim
- **Discussion (30 mins)**
 - Discuss all issues, starting with highest priority
- **Rate the Meeting (5 mins)**
 - Sarah
 - Tim

Tips for Effective Meeting

Have your Assistant be the one to prepare meeting agenda each week.

We use Google Drive, using Google Docs for our meeting agendas.

Use the agenda I suggest below and you (probably) won't need meeting minutes. Just circulate the Google Doc to anyone else who needs to see what happened.

Here's tips for each section of meeting agenda:

Good News

First part of the meeting - "Good News" - is there to set a nice tone and celebrate non-business wins. I've learned a number of nice things about Sarah and her family simply by taking a few mins to share good news.

Reporting

Second section is “Reporting.” The biggest single landmine you’ll face in this style of meeting is getting into discussion during the “Reporting” phase. Literally, Reporting should just be reporting.

As you review metrics, priorities, etc, discussion points are guaranteed to come up. But instead of discussing them immediately, make note of them in the Discussion section. That way, when you reach Discussion, you can look at all issues and strategically choose the highest priority to discuss first.

This makes sure you’re handling the most important issues first instead of getting distracted by second-tier discussion points.

Discussion

Third section is “Discussion.” Be absolutely certain to tackle the highest priority item first. Then the second. Then the third, and so on. That way, if you run out of time, you’re guaranteed to still have handled the most important issues for the week.

Rate the Meeting

“Rate the Meeting” is the final section. This allows us to: 1) Rate the Meeting; 2) Make suggestions on how the Meeting could be improved.

The most common improvement that comes up in our meetings is “Shorter Meetings.” As much as we try to get the job done in under 60 mins, we often go over.

Fastest, Easiest Way to Get a Great Assistant

Business Owners often ask how they can get an Assistant ASAP. They want to experience the same speed and freedom I enjoy in my business.

Eager to help, I started organizing my insights, tips, tricks into an online course.

With course outline in hand, I went to Masterminds around North America, asking for feedback on my concept.

Given the intense desire Entrepreneurs had around getting an Assistant, I thought the course was a slam-dunk.

I was wrong.

Again and again, Entrepreneurs said:

“Whoa. That looks like a LOT of work! I don’t want to spend 8 hours studying an online course, then 5 weeks finding an Assistant, then 10 hours training them, at best *hoping* to get it right.”

I forget how it’s taken 7 years of refinement and literally thousands of dollars invested around the world to reach our level of refinement. (And we’re *still* refining our processes!)

So I winced and asked:

“OK. Got it. No course. If I waved a magic wand and gave you *anything* you wanted, what would you want *instead* of the course?”

Almost unanimously, Entrepreneurs said:

“Can you do all the work to find, screen, and train an Assistant for me? Can you just give me a great Assistant, fully trained and ready to rock?”

I gave it some thought. I went back to my team and we discussed it.

We’re open to trying a Beta version of this service. We’re accepting only 8 Entrepreneurs to begin. If you’re interested, email Support@ProfitFactory.com. Perhaps this will be the easiest, fastest way for you to get a great Assistant!

Hope this Guidebook has been helpful for you.

Tim :)

Appendix

Below is a photo album including a few highlights of my last year. Wouldn't have been possible had I not had such a great Assistant.



*Chicago Symphony Orchestra
(Sept 2014)*



*Chicago Blackhawks NHL Game
(Sept 2014)*



*Carnegie Hall, New York City
(Nov, 2014)*



*Times Square, New York City
(Nov 2014)*



*Jamaica
(Jan 2015)*



*Jamaica
(Jan 2015)*



*Chicago Bulls NBA Game
(Feb 2015)*



*Olympic Cauldron, Vancouver
(Feb 2015)*



*Speaking at NYU, New York City
(Mar 2015)*



*One World Trade Centre, NYC
(Mar 2015)*



*Oakland Athletics MLB game
Oakland, CA
(Apr 2015)*



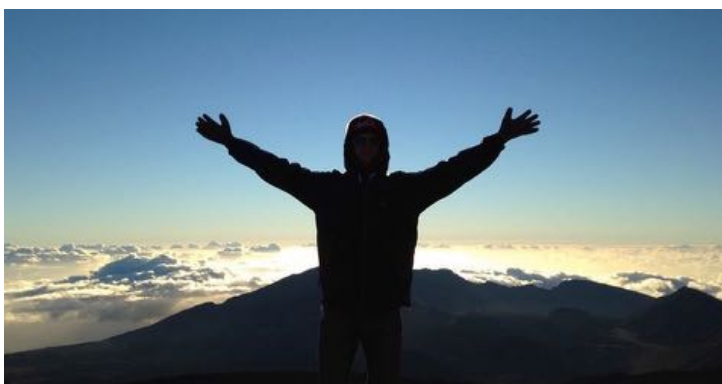
*Riding PCH1, California
(Apr 2015)*



*Kolbe Certification in Phoenix
With Kathy Kolbe
(Apr 2015)*



*The "Full House" houses, San Francisco
(Apr 2015)*



*Haleakalā, Hawaii
(July 2015)*



*Maui, Hawaii
(July 2015)*



*Consolation Lake, Banff, AB
(Sept 2015)*



*Banff Springs Hotel, AB
(Sept 2015)*



*Austin, TX
(Nov 2015)*



*Lake Louise, AB
(July 2015)*



*Bonnyville, AB
(July 2015)*