Episode 89: VA Training Masterclass Series - The First Victory

[00:00:00] Well, hello everyone. Welcome back to this continuing series and masterclass training, all about how to effectively onboard and train [00:01:00] your new overseas VAs. It's hard to believe that we're already in part three of this training series. And I have to tell you. Earlier today, I was showing my team with some of these slides, some of what we're going to go over.

And they were so excited for you in terms of what we're gonna be going through today. They said, Joey, this is the kind of thing that makes us love working with your team, with indie law, with the business growth and advantage stuff that we're doing. And if more teams that we were a part of did stuff like this.

We would just be in heaven. So I hope that you want that for your team as well. This is going to be some super, super valuable stuff as we move forward here. let's go ahead and get my, uh, face outta here as we continue. So we're, here just to get everybody a bit of a recap, what we are focusing on.

In terms of being [00:02:00] effective with bringing on overseas, VAs is installing what I like to call your VA hiring machine. And once you have this machine in place, yes, it takes some time to put it together. But once it's in place, you can rinse, repeat, put it on autopilot, pour money on top of it and have it be amplified, assign it to somebody else.

This is a really, really strong set of systems that you can put in place that will create a lot of leverage for you as you move forward. And there are four main parts. The application funnel, the auto qualifier, the inspiration interview, and the epic will welcome. As just another reminder, there are two main resources, that you have access to inside of the Facebook group.

Right now we have our a to Z hiring guide of, for VAs, which really is just a [00:03:00] ninja of a Google doc that walks you through most, but not all of this. So for this month, I know it's just that last part of the epic welcome, but this is a really important thing where we wanted to slow down and make sure that we were giving everybody really actionable, valuable, next steps in terms of how to effectively onboard your new overseas teammates.

And last week we went through what I like to call the captivating orientation, that first piece of the epic welcome. And, this week we're gonna be going through the first victory and then next week we're gonna be going into what I call the alignment check. So let's talk about, and a little typo here.

I meant to say that this is, shoot, you know what? Let me pull up the proper slides here.

Just a moment. This will only take a second

while we wait. If you guys have any fun, things that you're planning for the week, how busy of a time is this [00:04:00] right now, in terms of back to school stuff, how y'all doing.

All right. Just a few more seconds and we'll make sure the right slide's open for you. Okay. just as a recap to where we were. last week we went through what I called the captivating orientation, where we covered the welcome email, the official invites, the kickoff call. And then we talked about this next level opportunity for you to create a team portal.

If you wanna learn more about all of that, go back to that video. But today we're gonna be focusing again on what I like to call the first. Here's what's inside the first victory. It's three main parts. I call it the mission, the map and the celebration. And then if you really wanna go next level on this, which I encourage you to consider, I wanted to show you what my team and I have put together.

And it's really one of our secret weapons. We call it the team. Agree. I'll break down what that means in just a bit. So first let's start off with what I call the mission. And [00:05:00] again, this is all under this umbrella of what I call the first victory. This is that first assignment that you give to your VA, in the captivating orientation.

That's when you do the, stereotypical onboarding steps, right? Of just getting them into your systems, making sure that they understand their way around certain. But now it's time to actually start giving them work. And I love referring to this first assignment as a mission because it sounds way more fun and it really highlights the fact that whatever you're giving them is important.

That there's context. There's a reason why this is what you are assigning them. And. If you did, if you were with me for the last training, then you can remember these success steps that I had for you. And if not, don't worry. but

these are super, super helpful in terms of trying to figure out what a great mission would be for your team.[00:06:00]

Go through this exercise rate, how strong you are, one to five, five being the highest in these seven different categories. And this will tell you whether you should be prioritizing. Using your overseas VA to create maybe an SOP for SOPs, a master template for all of your processes, or something like creating centralized communication.

My team uses slack. We keep it really well organized. So that's easy to communicate. the next one is financial confidence. If you don't have another set of eyes looking at your books, your budget, cash flow projections inside your QuickBooks or whatever you're using super helpful there. Number four is course completion.

If you are like most business owners and there is just a never ending pile of courses that you've purchased or books that you've meant to read or whatever, that's a great thing to do is have those people have your new teammates finish. These courses, take the courses for you and [00:07:00] then share your notes and then time integrity, which goes into making sure that you're actually honoring what's on your calendar.

And then these final two of client support and lead conversion, which are very similar in terms of if either your clients, if you were gone for a week, would your clients be taking care of, and would you be able to still close sales? So go through that. It's really helpful to go through that. See, where you're currently ranking yourself the lowest and then prioritize that next.

I say that because so many people, when they bring on a VA are right before they bring on a VA, they get really curious. Okay, what are all the things I could have them do? What's the, oh, what are some cool lists? I can find about all the different things a VA can do for me. Those lists are fun to read. But you can fall into a trap really easily of trying to figure out how to delegate tasks.

That aren't the most valuable tasks to start delegating [00:08:00] first. And that's why it's really helpful to think about these tasks as, as missions that are helpful to the business and not just, you know, what's something new and created that I can de. That being said, if you go through that, you can see some different options that you can use in terms of a mission for your first victory.

And like I hinted at these are great options for a mission, including creating a master. So P template, setting up or organizing your communication channel,

something like slack, doing a financial reporting cleanup, my team. And I recently went through a. A more advanced version of that. It's so helpful for us to have clarity moving forward.

number four is a really fun one of doing a course completion marathon, having them spread through those courses that you've purchased recently, giving, writing really good notes and then sharing their big takeaways with you. Another really helpful [00:09:00] thing is to get their support as you do a time tracking audit of your calendar.

And then these last two, again, are, are very similar in terms of what does the client experience map look like? What are those touch points that the client receives on your end? and then finally the buyer's journey map. How can you be mapping that out? So you can start to effectively delegate those touchpoints and processes.

So all those are great missions, but honestly, I wanna do what I can to help simplify the action that you can take moving forward. So I encourage you to go through this exercise, see which one of these seven is a real opportunity for improvement for you. But let's put that to this side because I recommend that these are not the first.

They're great missions to put up as maybe second or third victories for your new teammates. But I think that there is a [00:10:00] stronger and easier first victory that we can all point to, which is this it's super easy. Send your new VA. This message on email or wherever you they're now messaging you. Hey, send me a video to confirm that you can access our main tools that you now have access to.

This is such a great first victory. This is such a great mission to first send to your new VA, because now you're just verifying that they are actually in, and you're also confirming that they can do things. Take a video recording and send that properly. So, even that requires some steps, but before we get into the steps again, we're calling this the mission because we wanna provide the context of why this is valuable, why it matters.

So it's really helpful to also pass along this context of, Hey, you're a new, important member of our team. We [00:11:00] want you to feel comfortable and confident as you work alongside. So feel free to ask questions and share your thoughts in this video that you send. Number two, I call this the map because the mission is where you identify, Hey, here's what we're gonna have you do next.

Here's why it's so important, but it's always helpful to attach a map to your mission. In other words, give them the plan, give them the keys for how to do the project. Well, I like to call, this, the map is how to. These are the details that as long as they're following the step by step, they win the mission.

And so you want to be as specific as possible and not leave room for interpretation or any vague stuff. So, number one, you can say, Hey, use the free tool loom to record a video with your camera and your mic and your screen all turned on. [00:12:00] So hit record with loom and then show me your work, email inbox, the new one that you have access to again for us.

that's inside Gmail next, and this is all one loom video. Show me your communication workspace. If you have one, if you're using something like slack, finally show me your task management workspace for us that happens in click up. So essentially what you're doing is having them share a screen and then pull up different types of browsers or applications from their phone or from on their video.

Just showing that yes, in fact, they are in these things. They do have access. We're still moving forward, though. There's a couple more things to do here. If you have any questions or concerns, ask them before you end the recording. And once you've done all of that, send the loom link. Two, whatever email you want to send them to, and even giving them the specific subject line.

Or [00:13:00] if you're sharing this with something like slack, then you can just, Hey, send this to me via slack inside this channel that we've set up again. We wanna give them all the details that they need to easily win the mission. All right. The third thing is what I call the celebration. Think about this ahead of time.

I know this is an easy win here, but it's still a victory. And it's important to get into the habit of celebrating with your team when victories happen. When the mission is met, when the map is followed, you don't have to go super overboard with it, but recognize and appreciate them. Thank them for the work that they did.

Explain again, why it's helpful. In terms of this particular first victory, it's helpful because it verifies that they are in fact, in these main apps and that they are very [00:14:00] easily, in alignment with steps moving forward. when you recognize and appreciate even, you know, this first victory, it really helps cultivate and inspire confidence.

Ah, this is important. Do whatever you can with your new teammate. To take advantage of opportunities to cultivate and inspire confidence. Because one thing that you really want to avoid is giving them a sense that they didn't quite do things right. That they're kind of off the ball that. They shouldn't be confident in their abilities because someone can't be both confident and worried about their job security at the same time, it's impossible.

And the work product of your new VA will go down. If they start to get worried that they're not good enough that they've got a micromanager, it's always hard to do a great job that they're just, you know, one message away from getting an upset message. [00:15:00] So let's kick this off on a high note and make sure that we're doing what we can to give them confidence so that they can show up more and more like a rockstar VA for us.

This also helps set a foundation for trust. I don't think I need to say more there, but trust is super, super helpful. We'll get into that later in this training. and also you can tack this final bullet point on when you are following up and celebrating with them that you have a next mission ready for them to announce.

And again, if you're struggling to figure out what the next mission is, go back to what we had just talked about with those options for a mission, those really strong, potential next steps, depending on where your business has the biggest need. Okay. Before we wrap up here, I dunno if you guys can hear that.

But I live in Chicago, next to a busy street lake shore drive, and it sounds like an ambulance just drove by. There were sirens. [00:16:00] They always do that, throughout the day, but it tends to be really timely whenever I go alive. And that happens. and I love that the sirens got cued up for this, because if you wanna take this to the next level, I highly re.

That you check this out. I call this the team agreements. And before I go to the next slide, I just wanna say, this is when I say team agreements. I don't mean your independent contractor contracts or your offer letter or whatever. I don't mean the legal contract stuff. I mean, something very different, something that is way next level.

This is something that we have created after years of not only building up our own team, but also, doing various types of, of coaching. And this is so helpful. You can put together a resource like this, and I'll make sure that I have the, the link available to all of you for access to this. But I call this the [00:17:00] team agreement.

The idea is that you can create. A version of this for every single one of your new teammates and this isn't stuff like a typical contract where you're saying, you must do this sign here. This is a conversation. This is really a living and breathing document between each and every one of you and your teammates, where you can slow things down.

You can talk with. You can put these agreements together, not just to avoid the worst case scenarios like a contract, but to aim for dream scenarios. And as you can see up top, there's a clause at the beginning that says the purpose of this team agreement is to set transparent intentions between us. So we can bring the most VA most value to each other.

As we work together in pursuit of our business mission and greatest life goals. [00:18:00] Totally different tone than even a typical contract. Right? And so here that is, again, the purpose of this agreement is to set transparent intentions between us so we can bring the most value to each other. As we work together in pursuit of our business mission and greatest life goals.

This also shows that you care about them as a human way beyond. Just them, helping support the company. And as you can see in this screenshot, there's a space next to every agreement for, you to talk through with your teammate. And if you both agree to it, you just put your initials there and you can always add to this.

I recommend revisiting it every performance review, making sure. Both of you are in alignment with it. And this is a really great tool to also refer to if you feel like they are not holding up their end of this agreement. So again, I'll make [00:19:00] sure that all of you have a link to a template version of this.

It's so helpful, but just to go through some of the really great agreement ideas, and you can add to this list, you can tweak it, whatever you want, but here are some of my favorite. The first is we agree to respect an extreme, no gossip policy, which my team defines, as we promise not to say anything disrespectful or harmful to another teammate without them present, unless it is necessary to do so.

We found that implementing this extreme, no gossip policy does wonders in terms of team culture and staying positive. basically, we're saying, Hey, you can't bad mouth. So, and so when they're not in the room and when we say that, what we're doing is we're creating a culture where no one ever has to worry that everybody's talking about them behind their back.

When, you know, that's the [00:20:00] case, it really allows you to free up your mind space, not be bogged down by a bunch of stress and anxiety of what people think of you on the team. The second is we agree to be on time and prepared for meetings. We are intentionally working together and will not allow distractions to interrupt our time.

A great one there. the third one is we agree to be transparent, honest, and candid during performance review meetings. It's great to work this agreement out, up front, and then you can return to it during the performance review meetings. If you feel like maybe someone's not being as direct or honest as they could be.

Just a, few more here because they're so helpful. this one is we agree to put facts over feelings and to be clear and specific when communicating with each other and the team. I love that one. the next is we agree to work from a mindset of big dreams for the future. We understand that to [00:21:00] accomplish anything significant takes time and happens through incremental changes.

The third one on the slide here is we agree to sharing openly asking hard questions and communicating fearlessly. We are professionals and agree that if something is bothering us, then we will discuss it, resolve it and continue on the path. By the way, if you're tuning into this video and you have any ideas for other agreements that you'd like to mock up and you can share with.

Entire audience so that we can all, you know, build better teams with your recommendations. We'd love for your ideas for agreements as well. Feel free to drop those in the comments. Here's just one more slide of three ideas. And again, all of these are in the template that we have for you. We agree to honor our word to follow through our promises, or if not to clean up our messes promptly.

That's a really big one on integrity. The second one on this [00:22:00] slide is we agree to confront issues with a sense of responsibility and ownership instead of shame or blame. And the third one on this slide is we agree to be positive, supportive, and inclusive teammates for each other and the rest of the team while we're all human and we'll have hard days, we're committed to lifting up those around us and finding gratitude in the present moment.

Now I get goosebumps reading these up, and I hope that you are inspired as we go through these, because again, it is really next level helpful to go through these at the outset at the beginning of your relationship with your new VA and clarify these big bold agreements. And it really. Does blunders for them as well.

like I said, at the beginning of this video, this is what I was talking about when I said that I was talking to my [00:23:00] team about what I had planned for this training. And when I. Showed my team that I was gonna be sharing with all of you, these agreements, they were like, oh my gosh. Yes, we love it so much that this is a part of our processes.

So I, I really do hope that you guys take action on this as well. And don't forget to ask them if they have any agreements that they want to add to the sheet. What's great is you can revisit these agreements, every performance review, make sure that they are agreeing that they're continuing to be met, that you are agreeing that they're continuing to be met.

And you know, you might have conversations about tweaking or clarifying the language or adding new ones in the future. All right. So that is the first victory in a Nu. and so in the last. piece here for next week is we're gonna go through what I call the alignment check. This is my team's version of a performance review for [00:24:00] overseas teammates.

You don't wanna skip this step. It'll help you proactively avoid a lot of issues in the future. as we prepare for that final. Training. It might not be the final, depending on what you guys want. If you have any follow up questions, we might be doing one more training here in the month of August. Uh, but before we get to the next part, I really encourage you to take steps on these success steps, complete these following prompts.

Number one, identify your core values. What are those words or phrases? That you can elevate to being the core values of your company. Maybe you already have them written down somewhere. Great. If you don't let us know, we can help you identify what those are. Number two, define what your core values mean.

We've found, man. I'm again, kind of getting boost goosebumps, as I say this, because this is just so [00:25:00] helpful for a long time. We just had our core values really emphasized with the team, but it wasn't until we took the time to really define just with the few sentences for each core value, what it meant that the team really got.

Because if you don't take the time to really define what this means for your company, people will have different definitions for what these words and phrases mean in their head. So take the time to define what your core values mean for you and your business, and then explain how each core value can assist your team in making decisions and modifying behavior.

I put that in here because so often either business owners. Don't bother with core values or they don't really use them. Core values are meant to be used. The whole idea of having core values is that when you find yourself confronted with big issues, you will look to the core values to be [00:26:00] your north star.

So explain or think about how each core value will be able to help your team as you, as a team are making decisions and modifying certain behaviors across the team. And then fourth and finally specify what it would look like to, for someone to be a shining example of each core value. Go one by one, through as many core values as you have and get really detailed on SP and specific of okay.

If, if there was somebody who really showed up as just a gold star ninja rock star version of embodying this core value, core value, number one, how specifically would that look and do the same for core value number two? And so. And that'll do it for this training. I know that was a lot, but hopefully we simplified the next [00:27:00] steps pretty easily for you.

again, this is so helpful and very much worth your time to take action on if you're not already in our free Facebook group, I would love to see you in there. You can just go to Facebook group.com/groups/. Business growth advantage, or just search for the business growth advantage Facebook group. We're the one with the lightning bolt emojis.

and then step two, also check out global vetted VAs. Uh, we've done a lot in this training, all about stuff that you can do in kind of a DIY style to help you take action on onboarding your new teammates. If you. My companies help with matching you with vetted VAs. We're happy to take a lot of time off of your plate and do so.

So you can just type the word, call in the comments and my team. And I will follow up to book a free strategy call with you so that whether it's global vetted VAs or something else. We can give you our [00:28:00] best recommendations in terms of next steps uses of your time, so that you can be quickly building out that army of overseas VAs to help you in your business.

That'll do it for today. Hope you all are. Well, if you have any questions, comments, things that you would like for me to circle back to or address maybe in a final week, feel free to let me know in the comments and, uh, my team. And I will definitely listen closely to any feedback that you have. All right.

See you everyone.