

Episode 45: Jam Session | Team Building Tips

Hey everybody. Oh my goodness. I am so excited for today's jam session of an episode. I've got some amazing people that I'm talking to today, and they're particularly special because today you're going to find out more about my own team and I've got. Yeah, I could be bringing anybody on my team and it would be great, but I am particularly excited and you're often really lucky to have Caitlin Allen and Jamie Adams with me.

My gosh, I love you both. And I feel like we could spend an hour going through the backstories of how I brought you guys on board, how helpful you've been to the business, but I want to be mindful of everybody who's watching this maybe live or on the replay or the podcast real quickly, Caitlin. And then Jamie, can you do a quick intro of yourselves?

Yeah. Hi guys. Um, my name is Kaitlin. I am the integrator and the, I think marketing lead right now for indie law or, and JCV. Oh, it's so weird to say that. Um, cause we have two businesses and then, um, I used to be the head of the operations department, but we hired Jamie. So Jamie has taken over that, uh, part of the business, but I've been with Joey.

For like ever, I think, um, four years in June. So that's pretty crazy. Um, but yeah, I've just been along for a lot of changes and a lot of growth I heard in the businesses and seeing how Joey has structured his team and how he leads a team in a very different capacity than any other business owners that I've worked for.

No.

Katelyn, you're always

a tough act to follow. Um, hi everybody. My name is Jamie. Um, I am the operations team lead and I'm actually one of the newest members of the JCV Andy law team. So I'm very, very new to this type of business. Um, but I've been working for about six months now, actually. Crazy how fast time has flown.

Um, but the structure of, uh, this type of organization is so different from anywhere else that I have worked. And it's just been so exciting to be along for the ride.

Well, it, it means the world to have you both. And I know that Caitlin is particularly aware of this because she, she saw it firsthand. But the reality is that I got more serious about team building when I had some pretty serious health issues about.

Three four years ago. And, uh, the details of, of that scenario is for another day, but I came out of it, realizing that I needed to take care of my self as well as I could. And in order for me to do that, number one, I needed to bring a team on number two, that team culture needed to be great. So that I could step away from it and trust that the team was working effectively.

And number three, I wanted to make sure that the team got to experience and enjoy that same level of health and wellness that I was shooting for myself. And along the way, and again, then with Caitlin and now Jamie's help. We've clarified. Some, some core values of the company. And before we went live, Jamie and I were talking about, you know, what, what tips do you want to share?

And one thing that Jamie said was consistency with our core values. And I think there's, there's one. I love all of our core values. And I have to say we have one core value that isn't really stated, which is fun. Uh, but I think that that's a huge part of making this, this work and be a joy for everybody on the team.

There's one value in particular that I wanted to focus on. And we'll probably do more of these team jam sessions in the future. So depending on how much time we have, maybe we'll get to another tip or value for everybody to consider. But the, the, one of the main values that I think really helps the team is transparency.

And one thing that I promise the team upfront is, you know, I know what it's like to be at a team to be working for a business. And to know that people are talking about you when you're not in the room, even if they're not being like gossipy, just to know that people are having a lot of conversations around your performance, that you're just not plugged in on.

And that can be a really uncomfortable thing to know. Uh, and, and Jamie now as the lead of operations, you're, I mean, you're really in charge of making sure that that's the case.

Yeah. So promoting our core values is, you know, something that I think we need to take a look at every day and in our conversations and the tasks we're completing.

Um, it's huge and it makes a big difference in and keeping everybody on the same page. Um, and one thing with our team is that, you know, we are never worried that someone's talking behind our back. If our name is mentioned, it's mentioned completely, you know, transparent. We can see the conversations, um, you know, we can ask the questions and that makes a big difference in feeling comfortable as part of the team and knowing,

yeah.

Caitlin. I know earlier you mentioned that. The, the culture that we have is pretty unique. Do you think that that focus on transparency is one of the reasons why.

Yeah. I think the focus on transparency and really being clear with our core values and integrating it into all of the different facets of the business.

Um, like Jamie said, having that transparency of knowing what conversations are happening and knowing that if we have an issue, we're going to go straight to the person that we're having the issue with or the specific. Um, process that we're having an issue with. It's not a person

problem it's most of the time, a process problem, and being really, um, transparent in addressing the issues and figuring out solutions and being helpful in addressing the solutions to the problems instead of just pointing out the problems and not being helpful with the solution.

Yeah. Caitlin, I mean, you know, this is so much. Easier said than done. When you have any tips for business owners who are either wanting to start their team, or they've got a team right now, but there just isn't that level of transparency that they they're hearing about now and would like to have

go on vacation, leave your business, drop it for a week.

Just go, just go do something. Nothing is going to happen. I mean, Something could happen, right? If you're a law firm owner, um, you have to be in integrity with the, uh, things that you've signed. Um, but Hmm. Let your people who are working for you do their job, um, because they will learn how to do that job well and effectively, and communicate better, um, with you when Joey.

Had that happened, um, had his health issues, Raina and I literally jumped in, we got his wife's phone number called her and was like, we're going to talk to you this day, this day. And this day we want updates and we'll give you updates. And we're communicating with clients. We're going to make this work.

We're going to figure stuff out. And we did, we had to write, we didn't have. We didn't have a clear line of communication with Joey at all for like a week. Um, and so we had to figure it out and the people who are working for you most of the time, trust and respect your business as much as you do, even if they're contractors.

I would never do anything to any of the people that I work for, that I wouldn't do in my own business. Um, and I treat their clients just like they're my own clients. Um, and I want what's best for the company. Right. So that's my number one. Suggestion is like, Go on a vacation and you guys, your team will figure out the issues, be like I'll be available from three to four every single day.

You can ask me any question, your little heart desires, but that's all I have for you.

Okay. Okay. I love that you took the conversation to vacations because number one, I think that's a great transition from like talking about transparency and how transparency allows a business owner to take time off. I remember after that health issue, It was a big milestone the team was working for for, okay.

How can we, how can we get to a point where, you know, the, the business owner is taking a week actually off now, like a glorified or Cajun, which I am prone to do as well, actually. Hi, I'm completely away from the business. And, and after hitting that milestone, which was great, we started to realize that there were other milestones that we had to hit her on that too.

A big one being it's not enough for the business to be secure enough, just for me to leave for a while. Really. It has to be secure enough for Katelyn and Jamie and other people. To leave for awhile in the business to still operate. And, and Jamie she's a fricking superwoman for coming back as quickly as she did, but she recently had a long out of office period because she had a baby and it was right.

Really impressive. Caitlin, can you talk about the, the work involved and how there were some new lessons we had to learn around? How can the team also. Plan around team members taking time off.

Yeah, I think it's that transparency aspect of like, as soon as you know, that you're going to be out of office for a time to let the toll team know, and not just the people that work for you, but everybody, um, because even if you have a set duty list, um, there are different pieces that can be given to different people, uh, to help fill all the puzzle pieces for the time being, um, And so I think the transparency of just telling people that you're going to be out of office the trust and knowing that other people are going to get your job done, um, because they want to see the.

Company succeed. And then, um, documenting all of the processes that you're doing. I cannot say this enough, documenting all of the processes you do in your business will only allow you to delegate even better. Um, so having them documented and into one kind of hub, um, we use click up for our team, but having it in one hub where.

You literally just have to reassign it and the task is ready to be delegated. Um, that's the most helpful thing you can do for your business?

Jamie, obviously like your, your brain was forced elsewhere while you were gone with some pretty amazing, incredible things to focus on. can you speak at all about this?

Kind of like where your mind was when you were thinking about. Work in the team. And do you feel like you had the real time to step away and not worry about things?

Sure.

So in preparation for going out, um, it was important to me to have conversations with all the team members. So, um, you know, that was for their sake, but also for mine.

Um, I wanted to make sure that I had done my due diligence and, um, you know, I treat my coworkers and. You know, you guys are a lot like family in a sense that I spend a lot of time with you during the day and during the week. Um, so that way, when I did step away, I felt completely comfortable that those people that were taking over my tasks, I not only clicked the button and click up, but that reassigned it, but I had those conversations.

That everyone felt comfortable with what they were taking over. Um, so that when I was out, I really was out. Um, if I was checking anything, it was because I wanted to, not because I felt like I had to. Um, and that really allowed me to, to focus on the things that I needed to focus on when I was, you know, out for those few weeks,

clarify that this isn't like a one and done thing, like, okay, You know, we we've launched horses before.

And whenever we launch a course, we always do a debrief after the launch to see how things went. And, and every time someone goes out of office and Caitlin and Jamie can both see, you know, we're learning lessons. We want to make this better and better over time. Another thing that I just want to highlight is that the Caitlin said, you know, you have to have these documents.

You have to have these systems in place. And if you're. A typical business owner. And if you're like me, that can feel really heavy. And I get that if like most visionaries, the parts of our brain that make us really strong visionaries don't really make us great detail planners. And again, this is, this is just another great reason why a part of your team should be people who do have this as strengths and, uh, I mean, I am so grateful that Jamie had that ability to only check in when she wanted to.

Not because she felt she had to. I also take zero responsibility for her, for that being the case, because I know that Kaitlin made sure that that was the case. And Jamie did a lot of work upfront to create that for herself. Um, so, uh, I'm going to open this last question up to both of you, uh, When it comes to starting to build a team, to have things like this, to have transparency, to have time off for, for the visionary and business owner, and then the rest of the team, uh, for people who don't yet have a team, what, what is a good one role?

Someone can hire to start doing this kind of work. And if you're putting out job postings, what would you call this? What do you guys

think? Jamie, do you want to go first? You go for, um, for me it would just be a VA like a generalized VA. Um, I cannot speak. More highly than I can about, um, our specific project manager, manager of VA.

And I mean, I love all of our VAs equally. Well, maybe not equally. I do have an affinity towards Gerald A. Little bit because he works for my business too, but, um, RVAs are amazing, but having just a generalized VA who. Maybe doesn't know all the software that you use, but can figure it out and is willing to figure it out.

Um, it might take a little bit more time. They're probably not as expensive as a specialized VA, too. Um, But just creating videos on how you do your day-to-day tasks because that generalized VA can write the SOP for you and get it into a project management software and get things organized. Um, just by having conversations with you.

I. Number one would say, like hire that generalized VA in number two, pick up a project management software and just let your VA run with it. And if you have no preference, let your VA choose because I'm most of the time your VA has an affinity towards one project management software. I might still be a little bit better that we're on click up, but we can run off their discussion, but there.

At least having it documented somewhere, having those processes documented somewhere will allow you to feel better about delegating, but also allow you to delegate. Um, and just a reminder, a VA can't read your mind. So doing a video is so much easier than making you write an SOP or figuring out. Um, there are things that we do and our day-to-day tasks that we don't even realize we're doing like opening up a Google document.

We have like five or six clicks before we even get to that Google document. And it doesn't feel like it, like, we don't even realize that's occurring. So doing a video and talking it out loud, is the, the ease

delegating

ripe. Yeah. Our, our video. That we send to the team I know are so, are so easy and helpful for us that send, and I know people on the receiving end love being able to just watch that instead of having to read through a ton of stuff.

Oh, wait, I have one more, one more suggestion. Um, when, when you're doing these, uh, when you're delegating these tasks, explaining the importance of why these tasks like, um, or explaining why these tasks are important, because. It might just be as simple as following up with someone or sending an image to someone or, you know, whatever, whatever it may be.

There's a reason why you're doing the task. And if you give that reason to the person who's about to do the task, it makes them feel like they're needed in a team. And having that makes you feel like a more cohesive team, um, as you're starting.

Yeah. Great points. Jamie, do you have anything to add on, on this idea of, uh, just like how to hire smartly around this kind of a more detailed oriented role?

Um, really just stressing the pre-screening process. Um, I know when I came on board, it was. Three four or five different steps. Um, before I even got FaceTime, um, with the team and I, I got to know what the expectations were and the type of person that the team was looking for. Um, and you guys got to know me a little bit better, so I think the prescreening for hire is huge.

Um, we want to make sure you're bringing on the right person, personality wise, skill wise. Um, and it makes a big difference in intern over.

Okay. I read that because that reminded me to, and I wanted to clarify this. Jamie came onto our team, uh, in large part because we have a mutual friend who was like, oh Joel, you're looking for somebody.

You need to know Jamie and I, a lot of people, I think we'll hire based on those kinds of recommendations, our team has learned. That even if we do bring on people that come in in that kind of a way, it's important to bring them through a larger process and for us to still go through having a job posting, having people get qualified and coming in, because as amazing as Jamie is, I want to avoid a situation where for some reason it doesn't work out.

And whether I say it or not, I blame my friend for recommending Jamie. Yeah. And so it's important as a business owner for you to go through those steps. So that subconsciously or consciously, you're not blaming people who are trying to help you, because if you put up a job posting, you'll probably get friends and maybe family saying, oh, you should reach out to this person.

And that's all great. And it could work like magic, like Jamie. Yeah. As you just want to make sure that you're, you're doing some due diligence to make sure that you're not setting yourself up for some weird hard conversations later. So yeah. I know Katelyn, Jamie and I both all have per run. Um, but if you guys have any questions around what, what your next hire should be our team and I has some.

We have some resources, some very legal like contracts and some not so legal, like our actual hiring and onboarding process. If you're interested in learning more about those, just feel free to reach out to me. You can comment below you can go to the show notes and shoot us an email if you're listening to on the podcast.

And again, thanks Caitlin. And Jamie, we'll do this again soon. Fiery guys.

Thanks Joey.