

Episode 97: Difference between VA, EA, OBM and why all are important roles at different stages of a business

[00:00:00] Right. So if you're like most people who are listening to the business Growth Advantage, you are a business owner who is growing your team, or at least wants to grow your team. And if you're like me,[00:01:00] , or like other business owners that I know, you get a little confused when you hear these different abbreviations of, do I wanna hire a VA or an ea or maybe even something called an obm.

There are a lot of letters out there, and there's no better expert that I can think of than Kelly Jameson Kelly has. , man Kelly, we could talk for ever about just all of the experience and skills that you've gained in this area. , but I always look to you as a, a team building expert who can help clarify for people what that title is that people should be thinking about when they're ready to bring on someone new for the team.

So thank you very much for being here, Keldi. Oh, thank you for having me here. I know that, , you and I have known each other for, , well over a year now. I'm giving us more because time has flown this past year for me. I know. , and just for people who don't know me, I am an online business manager and obm and I'm also an OM [00:02:00] trainer.

And I have been working in this online field for more than a decade. And before that I was in corporate as a general manager and all of those sorts of things in the background and I love , team is my focus. It's always been my focus as an obm. Like bring me a broken team, let me fix it. Let me empower people, let me get people in the right seats, , for my clients.

And there are a lot of. , and I think you and I were talking about this, I think you probably saw my post about, , I think it was like, listen up, , and EA is not an OBM or something like, , listen. , because sometimes what happens is people don't know who they need to hire or what position they need to hire for, or even what they even need.

They know they have a whole bunch of stuff to get done, and for some reason they're hoping for some unicorn person to come in who's going to actually fill

every role that they could possibly need on their team. Yes. Well, and I loved that you say that because that usually is what people [00:03:00] are wanting.

They're like, Oh, I want this unicorn rock star. , who do you guys know? , and to break down the types of people that you can hire, , we'll get to potentially , that unicorn status person that you might be able to find. But let's work, I don't wanna say from , the bottom up, but from like , the doer level up.

How would you describe , the different levels to these VA eea OBM possibilities. Okay. So there, yeah, there are no, , what I call levels either. Yeah. , we are all team members. We have a specialty that of something that we're really good at that lights us up, that we're, , like an expert in that we do better than other people in certain areas.

And so we need all of these people on a really well-oiled machine and a team. Yes. So there is no one role is better than the other as an online business manager, , excuse me. I manage teams and I cannot do what I do without the other team members. It's impossible. , So the first position we'll talk about, let's [00:04:00] talk about the EA first.

So the executive assistant, because this is actually a really great place for, , business owners and entrepreneurs to start with. So you're by yourself and you're solo, and you gotta do all the things happens to everybody. , we all start a business. We do all the things. Yeah. And then it's what do you need to take off your plate first?

And yes, we can hire consultants and experts to come in for different, specific things where we have no skills, but there's things that we do that, , as owners that we shouldn't be doing anymore. Like when we are literally trying to grow our business and expand our business, have more sales calls, work with our clients more checking our inbox, doing our calendar, , writing letters, having templates, all of those things.

Something that somebody else could actually help you with easily. And so starting with an executive assistant is a great idea. Executive assistants are literally there to assist the [00:05:00] executive. That's you as the ceo. They're there to make your life easier. They're not there to run the team. They're not there to project manage things as an executive assistant.

They are there to take care of you, your inbox, your schedule, whatever it is that you need them to do. Maybe it is some more technical things once in a while,

but their focus is on, , making sure that they own their own role and that they're assisting you so that you can own your role fully. Mm. Very much needed.

Very much needed that role. That's so well said, and I hope everybody who's maybe watching live or their replay, , give me like just a heck yes in the comments. If you're hearing this and you're like, Okay, this is gold. , I need to, , make note of this information cuz it's gonna be super helpful for me when I figure out that next best fit.

, I heard you say two words that, caught my attention when you were talking about the executive assistant, your inbox and your schedule. [00:06:00] So in other words, your email and your calendar. Yeah. And it sounds simple, but those things are complicated cause it's not even. Checking your inbox. It's organizing things, what needs to be responded, what needs to be put on the client's calendar to address that's come into the inbox, things like that.

It's also confirming appointments so that , your client isn't having no shows. It's making sure if they're a coach, for instance, that somebody has done their homework before and it's submitted so they can do that work. It's setting the CEO or your client up for success in all the little things that come and , Keeping the schedule on the calendar as well.

I had a client whose calendar stressed me out. She lived by the calendar. Absolutely everything was on her calendar. 7:00 AM to 7:00 PM every spot. Even to the point where we had to start putting in, go for a run, eat lunch. Like she lived by this calendar. I don't know how she did it. I need white space now.

I think I was, [00:07:00] I think I have PTSD around the calendar because it really did. I couldn't live like that. She, we told her what to do. We literally said, You need to show up , here, and here. It's in the calendar. Here are the items that you need to deliver whatever it is you're delivering, and set a timer on your phone for the next meeting and the next meeting or whatever she was doing.

, but she literally depended on the team to make sure that she was where she needed to be, when and where she needed to be there. So , it's a really important role to have, , an executive assistant who can do that for you and. , I love that you talk about this , as a really great first hire if you're looking to bring on some type of , a virtual teammate.

, and I, I'm sure Keldi would agree with me, that there is a wide spectrum of potential types of candidates and skill levels. If you're wanting to bring on someone as an executive assistant from someone who is super skilled with years

of experience and knows how to really do this and implement their way of mastering it to you, , or [00:08:00] someone who is maybe newer to this, but very willing to learn, , , at either end of the spectrum, Kel, do you tend to see, , a recommended timeline of give it this many days for it to really be , a well-oiled machine?

, 90 days is usually a good rule of thumb for any team member because the first 30 days is them getting to know you, getting to know the business, sort of getting to know the routines. They're not taking full ownership of anything in that first 90 days. It's all about learning. And then, , the next one is about them transitioning.

So it's about the next 60 days should be them taking on a little bit more ownership and you're feeling confident their training is going well. Cuz don't forget to train people. People do not just magically sit in a seat and , can do whatever it is they're supposed to do. We do need to train them, right?

And, , make sure that they're fit for values and the vision of the business. So that's all coming in the first 30 days. Then they're, as they're training, they're getting more confident, but they still need [00:09:00] you as the executive, to let them know that, Oh, I don't do it that way. I do it this way. , new situations will arise that you didn't think about putting in the training.

It always happens. So let that happen in that 60 day period. You are going to start to. , if you think there's potential for this to move into that next 30 days. So this is where you're gonna start between 60 and 90 days, you're really gonna start to look, is this person, , working out? , are they starting to take ownership?

Can I see the development? Can I see that? , they're all gung ho and they just need a little more help, and I think it's gonna work out in the long run, or they know exactly what they're doing, but oh my goodness, I just can't handle it when they do , this, and this, and I find it annoying and I'm not gonna be able to work with this person long term.

, there's, it comes with both, right? You're not, it's hard to find the unicorn. And yes, we'll say that some people exist. , we feel that way about them because , they fit our personality and the way we work. , yeah. Well, , I'll say this too.[00:10:00] , the more unicorns your business has, the less your business is worth.

The more that your business depends on a few people being absolutely amazing at their job and a total risk to your company, if they leave, the bigger of a red

flag there is on someone doing like an outside evaluation on the strength of your company. Oh, I love that, that you even said that because it, because I work with systems and processes and what I do.

, it is , very true. Someone should be able to leave the business for whatever reason. , health things come up. , different reasons that people wanna leave or get promoted, , to other positions. You don't wanna hold someone because they're a unicorn or they can never leave cuz they're the magic of person that does this role.

That's not fair to them. So what I like is that we do bring in those systems and process. and we're not bringing them in because everyone tells us to bring them in. It literally is, think of it from a training perspective. [00:11:00] If somebody else had to sit in that seat, we bring, we do the processes so someone else could, , pinch hit for someone and step into that role and do it.

I'm not a very technical person and so I am like a really good tester for standard operating procedures cuz I know nothing like, you better tell me how to do everything. That's, , I know what it should do and I know what I'd like it to do. What actually, Clicking all of the buttons. I don't necessarily know that there's like 25 tools that do all the same things, so you can't know everything.

So it is important, , and I do understand that because , even in the online world, businesses are selling now, like you, you can sell your online business where people weren't sure about that in the past. And your business, in order to get that value, higher will have, if it has SOPs, you are like, someone's gonna look at you thinking, Oh, I can buy this because I can literally plug myself.

Yes. Right. You can plug a team in and like you said, you just, you can't be held hostage by any team members. That's what , I call it [00:12:00] because, ah, sometimes, if people want to be irreplaceable and so they don't wanna write the so p , for their job or their role , or say what it is, they're not on my team.

Right. , I'll be the first to let them go. It. My goal is that everyone is replaceable. It's like a little saying like, be replaceable. It's a goal. And that's so you can go on vacation. Yes. You can get sick, you can get promoted. I'm so glad you say that. And so much of this, by the way, is true for any of these titles or types of positions.

But yes, , it felt very weird the first time I said that to my team of , I love you guys, but the whole point here is for you not to feel like you are irre replace. , and that might be an immediate kick to the ego, but it will actually give you

more confidence, help with team culture. And , it really stinks when , that great feeling of being like, Oh, I'm so special.

This business needs me, turns into I have to work on this vacation [00:13:00] because the business needs me. Yeah. , that's exactly it. I literally took, , a two week vacation at one point and then booked another vacation right away. So I was gone for two weeks. I came back for three and went again for a week just because, , the universe, whatever, set me these wonderful vacation packages if I didn't have SOPs in place, that someone could follow even me as the manager to replace me so I could go , and feel confident so that I knew that the client, even when they checked in, was confident.

I mean being replaceable, , it is just really important. , I was going into a launch with a client, so anyone in the online world that knows about launching, we were going into a launch with a client and my father passed away. And you know what I did? I went and I went with my, to be with my family and I checked in with my team, Is there anything you need?

At one point they're like, Why are you even talking to us? How are you doing? How's your family? How's your mother? They didn't care. They didn't want me to work. They didn't want me to check in. They had it covered. We had SOPs [00:14:00] in place. Even with a launch, somebody could step in and run the plan because that's how the business is set up.

And so when you can do that, when life throws you a curve ball, you can take time away. And so I love that you like brought this up about it. We want to be replaceable. It is, yeah. It's just so important for , so many reasons. Well, , I'm excited, but not surprised that we just continue to be aligned on thinking the way that we do.

, so , we talked about that executive assistant or that ea mm-hmm. , , and I love your tip, but that's a really good first hire. If you're looking to bring someone on. Is there another position that kind of comes next or is similar to it? , the other term that's out there is virtual assistant or VA and virtual assistant has a really wide spectrum of capabilities.

And I think we mentioned this before, pretty much anything that is done virtually in your assistant could make you a virtual assistant. Sure. , for those of us that have [00:15:00] worked in the industry a little bit longer, there seems to be, , a group that we call like admin, virtual assistants, , and then techie or technology based virtual assistants.

And they do different scopes. , an admin, virtual assistant can act like an EA checking your, , email, , doing your inbox. But a lot of times they also do customer service. And so these, what we call general admin VAs are really, , brought in to take some of the inbox stuff off the. But when the business goes to the next level where you're building out a bigger team, that admin, virtual assistant may no longer be the executive assistant anymore.

And they might, , transition to, or you might hire instead a customer support role where they're checking the company inbox and dealing with support tickets and really helping, , customers service. And then we have techy EVAs that might be, , doing your website. They might be, , hooking things up. , they're not necessarily social media, usually.

Social media, virtual [00:16:00] assistance, focus on, , graphics and, , pinning and drafting those things up and commenting and engaging with your group. There's three different areas, but really we're all freelancers and . When you think of a virtual assistant, it could be anything. Cuz we used to call, , people that designed websites.

I'm a virtual assistant. Right? , but not all virtual assistants know how to do WordPress. , I took a course on how to learn how to do that, and you would never have wanted to hire me. It would've looked ugly. I could have made it functionally work, but it would've been awful. , so , there's so many things.

Like sometimes people, , will call a copywriter a virtual assistant. I don't know why in my head, copywriting is such a very specific, , niche. When I say that, it's because it's not necessarily something that is easy to learn to do sometimes. It's one of those things that people that love to write, , and then have a knack for it, find themselves going in that way.

Yeah. As a techy va, you can learn it. , I wanna highlight. Part of what I'm hearing you say, which is [00:17:00] that, , and I love your grouping of the techie VAs and the admin VAs, and , you didn't say this, but one thing that really struck home cuz I've been having similar conversations is part of this split of different types of VAs is there's a group of VAs who do things well that you really don't know how to do.

So you're bringing them in cuz they're smart tech wise and they can figure it out. Or at these admin VAs are more of, , I could do this but I really should be spending my time elsewhere. So let me have these people be following these processes. Not because they're particularly skilled at it more than me, but just because I need to remove myself from this position.

Oh yeah. So admin VA's. , the great thing about administrative VAs to me is they really understand how to deal with people. So that's one of those things, when I say they could be like an executive assistant, when they [00:18:00] deal , it sounds like when you say, Oh, they're checking my email and my calendar, it's more about, , serving the person.

, and so they're taking care of customers. They are problem solving. They are making sure that whoever they're supposed to be helping is being served. And a techie VA is focused on the actual tech side. So they're not customer facing. They're not even necessarily client facing. Yeah. They are in there saying, You want me, you want this thing to work with that and do that thing.

Okay, I know how to do that. I'm going to do that. So sometimes there are different personality. Yes. Totally. Totally. Good point. , the other part to this that I think is really interesting, and one thing that I've learned is. , I'm talking to more and more people who, let's use the examples of either , a lawyer or a , a graphic designer who is just getting super swamped with the work from their clients.

And when they [00:19:00] hear about bringing on a va, they're like, Oh, it would be so great to have someone start to do this work for me so I don't have to get buried and do it as much. Correct me if I'm wrong, but one thing that I'm hearing you say that I just wanna distinguish is , this customer support type of admin VA , is not necessarily like doing the fulfillment work for you.

They're not taking on the legal work or the design work that, that you , are doing well. There's a difference between delivering on the service that you've promised to fulfill and having a really good customer service experience. Oh yeah, they're totally different. I, yeah, it is. You're bringing on people to take on things that are, , we say not in , your zone a genius, but it's really more of if you are, , a lawyer , or a graphic designer, you have training and a very specific ability, possibly a style or a niche that you're really good at.[00:20:00]

That's what you need to stay in. And if you're answering customer service emails, yes. That is not the best use of your time. Even though you might have enjoyed that, like in the beginning, it might have been something that was a great personalized service for your clients. As you grow and scale, you do need to look at your time because there is only so much time in the world.

Yeah. And so what can you take off of your plate that someone else could? Nobody else can do the other work. , you cannot hire a virtual assistant and say, Hey, can you, , draw these things for me? Or Can you write up this legal brief?

That doesn't Right. Even make sense. , even if there was a template, Oh, if someone asks , this is actually the legal thing that you're gonna have them send.

But that's not for them to determine because they don't actually know. They don't actually know. And so when it comes to graphic design, the same thing. , there's the picture. Have you ever seen the picture of the horse that someone did for graphic design? There's that mean . And it's like the [00:21:00] beginning of the horse at the back is really good, but then the client asked for cheaper, so then it got a little bit less, and then a little bit less like a kid.

Yeah. , and I always think that whoever drew the last picture drew it even better than I could possibly draw it. just made me laugh. But , you need to stay and give to your clients. You give to your customer. The best of you and the things that you might enjoy because it feels good to connect with your people.

You, you're gonna have to let go of and let, , I don't wanna say you have to, but If you're wanting to scale and grow and make a bigger team, you need to offload the things that other people can do for you. And chances are they do it faster and they do it better. Yep. Yet, , you're the zone.

You have that zone of genius for law and , I could work for you for 10 years and think I know quite a bit of stuff cuz I've been hearing you talk and I understand whatever. I'm still not the lawyer, but I can support you in everything else behind the scenes to allow you to go and shine in that role so you have more energy and more capacity [00:22:00] to deal with your clients.

These support professionals, we are here to support you. And that's how I want people to think about this. We are here to like helping. So helping you Joey , as a lawyer, I know that you're helping hundreds of people and by helping you I am helping hundreds of people. Yeah. By supporting the ceo I am helping hundreds of people.

This is how I felt. , as we later will talk about, as an online business manager, , what I call standing in the light. So , not that you're have to be an influencer, but the more you're seen visibly in public, there's good, and sometimes there's bad that goes with that criticism in different things, and it can be a hard pill to swallow.

Sure. The person that stands in the light, as I call it, , needs that support team behind them so they can remain there. And so I have always been on a mission to empower other women. I didn't care what they did, I just wanted women to feel that way. My ideal client as an online business manager was women

[00:23:00] empowering women, and I knew that by my support of, , of the team and helping that CEO to run the business, that I literally impacted thousands of lives.

Like I literally have met my mission by being behind the scenes. I didn't have to be this person that is, , posting all over social media and showing up whatever. I could literally be introduced. Thousands and thousands, right? This is why it's also important and why I love our industry, whether you are an executive, a va, whatever, working virtually.

What I love about it is we also get to pick our clients. So it no longer are we walking down the street going into offices asking someone, Are you hiring? And you just want money cuz you don't care cuz you need to get a job. And that happens for a lot of us. But when we're online, I can literally pick and choose clients.

Doesn't mean that I'm gonna win every client that I want, but there is, , a way for me to buy into the vision really. Like I [00:24:00] really wanna work there. Think of it like everyone wanted to work for Google and Microsoft and whatever in the day, and they would knock on the door to get into that building or whatever to try to get a job.

And now in the online world, you can find things that light you up and that again, when you're hiring that, , executive that we were talking about. If they have a really good attitude and they really are, , keen on what you're doing, you might train them a little bit longer because they're gonna last longer.

Once they're good at that position because they bought into the vision, they understand what you're doing and they feel excited about it. Yeah. Hmm. So good. So good. And before I forget, I also want to ask you, cuz you brought this up before you went live, , that difference between an executive assistant and a personal assistant.

Now, , do you still see personal assistants as under this just big spectrum umbrella of a va? Or is it something else? I think it's a little bit different. , personal assistants usually also take care of personal matters, so they might be [00:25:00] buying gifts for people. , your executive assistant can book flights, but personal assistants can literally go pick up your dry cleaning.

They can go pick up your kids from school. So they're usually local? Local? Yeah, they're usually local as a personal assistant. , . I remember going for an

executive assistant role many years back in corporate. When I got there, they said, Well, you need to be able to go grocery shopping and this and that.

I'm like, Ah, , no. That's not what I do. I'm an executive assistant. This was back decades ago. And it was interesting to me because this person that needed this, they did need that role, but they were describing it wrong. So I felt like it was a waste of time because literally they basically asked me to put my life on hold for this person.

, they literally asked me, You need to be able to make sure that this is stocked. If they say they're flying in, you need to drop everything, Go to the grocery store, bring it, stock the fridge. , and I was like, Well, what if I'm doing something? , no. This person comes first. And I'm sure that there all the roles aren't like that, but we know that it has to be, even just based on influencer and celebrity stuff, some of the things that people [00:26:00] have to do to be their assistant, it's a different role.

I almost think that it's. Again, it's a real personality thing to serve someone in that role. , Yeah, and , to wanna take care of them. And I don't wanna say like a mother, but I feel like that. It's like all of a sudden you are literally taking care of them, their family. , they might still have an executive assistant and you're a personal assistant and they're all, they can all be needed, but usually personal assistant is local.

It's, , so personal assistant , is local. I love that clarity. Is it also still a business expense or at that point, is it more of a personal expense that, Well, if they cross over and do business stuff, I think that it's a business expense for a lot of those, , people. , if you had to hire a taxi to go pick up your kids from school, , so it's like high guess.

People would think it's like hiring a nanny, but it's not. So they can still be managing your calendar. They could still be doing some other things for you. , but they're really focused on,[00:27:00] , the work day doesn't end and the door close so much. There's usually a little bit crossover. , and I, and here's the thing.

So personal assistants in itself could have evolved that I don't know about. So I don't wanna say that I'm the expert in a personal assistant role. I understand executive assistant, but there is a line between business and then crossing it to do stuff for personal, which involves , their friends and family.

, I actually had a boss at one point who had me doing up his son's hockey schedule for ice time when I was in corporate. And I'm like, I'm not your

personal assistant. And he's , I'm paying you and you need to do this spreadsheet for me, . It's just , wow. You know what I mean? Huh. . But that was , so just a note to business owners really respect the boundaries of however you're hiring people in these capacities.

, expectations. Yes, 100%. , and I wanna build towards this conversations , of OBMs online business managers and really your sweet spot. , but , as [00:28:00] we look at just the accountability or organization chart of a business and how you can start to place, , certain types of assistance at like those performer or doer level tasks, and then you will look up to more like leadership or strategic level positions.

, , is there a term that we should be talking about before we start to mention obm? , , I think it depends on the, how big the organization is. Okay. And how many team members you have. Okay. If it's a smaller team, you might have, , a couple of virtual assistants, a tech virtual assistant, a social media person, which sometimes they're called social media managers.

, sometimes they're just a social media assistant. , and then we have the admin assistant, and then you would bring in an obm. So if you're a smaller business, let's say under seven figures, you might get away with that. Oh, sorry. There it goes. My mic. , so that could be one structure. And an online business manager comes in [00:29:00] when the team has usually a couple of virtual assistants in it already in some form.

Okay. And then an online business manager comes in as the team expands and starts to grow, then you might need more management and more accountability, more ownership, , without burning out your team. And so you might end up, let's say with a marketing manager that might come in under the online business manager.

Sometimes we share that role with someone, but the marketing manager might actually, , give things to the tech VA for the website. , then manage the social media virtual assistant to make sure all of that stuff is happening. Blog writing, they take over all of the marketing side. Yeah. And.

They're, I don't wanna say that they're, they're typically in, in an org chart. They are below the online business manager, but I dare say they're almost equivalent because they're taking on a huge aspect of the business [00:30:00] to take on the marketing. So from a funnel up to the client point, they're probably under the obm, just so that they have somebody who's gonna help serve them, support

them in their role, , make sure the team members are, helping them if they're having an issue.

And, , making sure that the client's expectations have filtered down correctly. Yeah, but they're, sometimes they're almost parallel. , I wanna say, but it, you do need, , you do need to make sure that the online business manager who is acting as the partner , to the client, that person that's making sure that everything is running for operations.

We're like, we're looking after. Everything to make sure everything's implemented. So that's the reason that the marketing manager might come underneath us in an org chart just because we can hold everybody accountable. Somebody's gotta be there to serve everybody else at that top level from a leadership level.

And that's where that kind of comes in. Okay. , and , we'll definitely dive more to the weeds , of OBM because I feel like out of everything we've talked about, that might be the [00:31:00] newest term that people might not be familiar with. , but I know that there's a lot of talk of eos and integrators or having , a coo.

I'm hearing more people talk about the idea of a fractional COO for your business. , are those words all interchangeable with OM or is OBM something different or more specific than what people think of when they hear integrator or coo? . Okay. So again, it depends on the size and structure of your business.

Okay. , and eos and Integrator, those are terms coined by Gina Wickman. He wrote the book called Traction, and then he wrote it again with someone else called Get A Grip, which was more like a story, which was my favorite version to read and listen to. Yeah. , and then he wrote, , the book again with Mark C.

Winters called Rocket Fuel. So again, Gina Wickman the author through all of these, but then he partnered with some other people. And Rocket Fuel is based on the relationship between a visionary and an [00:32:00] integrator, and they are not necessarily. Someone that's above the other, they have different roles. Sure.

So the visionary is looking at where the company is going. What's the big picture vision? Sometimes those people stay in a creative role or research or something. The integrator is, , it could be an obm, but an integrator could be their partner. Like if you have business partners, you both can't be visionary.

One of you has to be the one responsible for getting stuff done. And one has to be the one that's like leading the vision for the business. , those, , terms, integrator and eos, , they're actually meant for the corporate world, for businesses that have So glad you said that. 250. Yeah. 10 to 250 employees.

So they're not necessarily meant for the online world and people are trying to apply it there. And yes, there are ways that they can do that, but it's literally meant for a bigger company. And in the online world, people can hit seven figures with. , two or three team members. , we're actually small [00:33:00] business.

Like even when people are saying like, I'm this great influencer online and I make, , \$5 million or \$7 million, you're still a small business when you compare us to businesses in the offline world. Stores that are bricks and mortar, that have inventory and employees and a whole bunch of things. So we're still small business, right?

And so sometimes applying systems meant for , a different, , culture, I'm gonna say like a business culture and how they're run can be a little different. So people are asking for integrators because they're wanting this person who is similar to an OM to help them manage the day to day of their business.

And they're giving them this great term because they've read the book Rocket Fuel, and this is supposed to be your kumbaya partner in your business and this is what's gonna happen. , but you can start to try to put in meetings and systems and whatever that aren't necessarily needed quite yet. In a small business, yes, they're meant for bigger businesses.

And then the COO part, again, a [00:34:00] COO is, , a larger position. So when I worked with my clients, I would almost consider myself a COO for that company. , I looked at legal, not that I knew anything. I just had a bad experience once where I lost a business in the past because I didn't read a contract.

So I learned how to read contracts and ask questions about, Hey, this is interesting, or I don't understand it. So I would do that for my clients. I would interact , with the lawyers that were hired. I understood bookkeeping and finance, so I also worked with the accountants and understood some of those tax requirements in hr.

I dug in because that was from my past career in corporate. I had that experience and I also brought that in. But that COO level, again, they are there

as the chief operating officer and they are not there to manage the day to day little things. They are there to keep you on track for meeting that vision and they usually have people underneath them.

So again, think [00:35:00] corporate, that's why it's Chief Operating Officer. When a business is in the high seven figures, they might need one. So it depends on the business. If you are running a digital marketing agency, you could definitely have a COO in position because you are going to be having like a graphics department and a customer relationship department and the sales department and there's a whole bunch of things that are there.

With a bigger team, you have a lot more people to manage. So you have department. and then they report to the COO and having a fractional, which just means part-time. So I always laugh when I hear the term cuz it sounds sexy. I'm a fractional. , okay, it just means part-time. , so let's be real about what that means as business owners.

It's a part-time person who's going to make sure that your operations are running and they should have a lot of people underneath you. Part-time in the online world, like even full-time in the online world can mean whatever it is that the contractor determines means full-time doesn't mean 40 hours a week.[00:36:00]

My full-time might be 25 hours a week cuz that's what I've allocated to work in my business. , if you're my full-time client, I could still only be working 25 hours for you. , , you need to look at, , as long as someone gets the job done, I don't really care how many hours it takes them to some degree.

Right. If the results match. So you could have a fractional, , coo and I do know people that do that work. , and, but they're very regimented and great systems in place and they have a great structure of people underneath them, and they can run the business on that timeframe. But not everyone can do that.

So I just, it's a, I like the term, but it's usually for a larger company with a lot more team members in the structure, it's not, COO is just a, what is it a gratifying term if they, if there's two team members and you're calling yourself the fractional coo, that's just a gratifying term. Yeah. In my opinion.

I love that you're painting this picture because. [00:37:00] This should be just a caution to everybody who's listening and watching not to make these types of team building decisions out of ego. And keeping in mind that books like Traction, , I do think that they can be helpful for business owners across the board, but keep in mind who they were really meant for.

And I can't tell you how many business owners I've seen read the book and then from a very good place say, Oh, , I need an integrator. And that might be true, but there's a lot more digging in you can do to , the data to what's right for your business where it's at right now. , a as we start to transition back to OBM and specifically Keldi, how you can help people if they're interested on this, , one thing that I'm realizing as I'm talking to you is, when it comes to this integrator talk or this COO talk, , I know that it's meant for bigger businesses, but like you hinted at there is this [00:38:00] idea as you're figuring that out, that, , it could very well be that someone who's currently in the business fills that role of integrator or fills that role , of coo.

And one thing that I think is, , very helpful for people to consider when they think about this OBM concept, and correct me if I'm wrong, but it seems like , it's necessarily an external hire. It's not like you look at your team and you're like, Oh, this person is actually the OBM in the company.

We're gonna have them have that title. It's more that , this is something that. Oh, you do this type of work in the business, so you technically fill this role of being an online business manager. It's, this means something that people have been trained , and maybe even certified in.

And , it's not a who's name on our team fills this box. It's who's the type of expert that we need to bring in to help the company. , it's actually both. Okay. So I just wanna let you know this because, , I actually trained , , an OBM that came to me from a business that [00:39:00] had hired one or two that never worked out because they didn't share the same value and commitment to the team.

And so what they did was they had a long time, , contractor on their team that was a virtual assistant, and they finally just said, , would you mind stepping up and learning? And I trained her to become a certified OBM because she met. The deeper need of really valuing the commitment and the vision of the business.

And she'd been long term and she just needed to learn some leadership skills. And then of course some other skills that she didn't have, but they actually outsourced and literally brought her in and I trained her up. So I don't wanna say that you can't do that because it was the best solution for them was to work from somebody that was already really committed to their business and then train them up.

So that can definitely happen. And you mentioned working with them, training them up [00:40:00] certifying them. , do you need to be certified to take on that title of an online business manager? You don't need to be certified. Okay. , I am a certified online business manager and I'm a trainer now for that association.

So to be a member of the International Association of OBMs, you do have to get certified and go through our program. And that's so that everyone comes out at the same level, the knowledge level. And in fact, we just updated the training, , with more launch stuff cuz I've been doing launches forever. So we did in-depth launch stuff in our training, which I'm super excited about, which is new.

But what I love about being certified, so when I started 10 years, I discovered the term online business manager. I was calling myself a virtual partner. I didn't know what to describe it. , I never heard the term and I wanted to work at this level. Then I read the book, Becoming an Online Business Manager by Tina Forsyth, and I was like, That's it.

Now I know what I'm called, so now I'm gonna go do it. That's not what happened, actually. [00:41:00] So just because I knew the term and knew that everything that she said was how I wanted to work with clients, it didn't actually work for me. So I knew about the training. I didn't take it. I'm just gonna go do it, you know?

And then what happened for me was I was not getting online clients. I wasn't getting the right client. I was getting people that were looking for a remote office manager, and somebody else wanted me to do bookkeeping. Oh, sure. , when you're first starting in business and you need money, I took the bookkeeping job because I needed money.

That's, , you start. Yeah. But I wasn't finding my ideal client, so then I did the training. And the training was like, Oh, okay, now I know what I don't know. Cuz I had come from corporate. I was confident in leadership, I was confident in team management. But team management is different in the online world.

It's not employees, it's contractor, it's having, it's leading people who are their own business, right? It's different than employees. Then there's a way to hire them and lead them. That's different. [00:42:00] So I learned these skills that I didn't know, and then I actually got access to their like being in their directory for people to find me and for the request for proposals.

Hmm. And then I got my ideal clients. Things completely changed once I got certified because people who were looking new to go to the association like it, just like online business manager.com, simple. , and they literally have a directory where you can just pick people who've gone through , the training, , and hire them.

It made a huge difference for me. They have a community, colleagues over competitors. You, Joey, you and I know that there's no such thing as competition. It's like it's, they should be your colleagues. And it truly supported me for 10 years. Like literally I've been doing this since, , I've started my business in 2009.

I got certified in 2011 and my business took. I didn't have a website for, , almost 10 years until I became a trainer. Wow. , word of mouth referrals. The RFP process, just networking with people is how I got my, , coming soon on my [00:43:00] website for , almost 10 years. , it's kind of sad actually.

Oh my gosh. , , I love that I do that and so I love the certification just because it's the best way to get into our community and I feel confident recommending anybody in our community. I don't even have to really know them that well, but I will ask them who their ideal client is. I will ask them, , what do they love doing as part of an om because again, OBMs are trained to do a lot of things, but you don't have to find a client that, , wants you to do all those things all the time.

So I teach people how to write SOPs and standard operating procedures, and I'm honest with my students. I don't like writing them. I don't like it. I love team. I love broken teams. I love leadership. I love launches, SOPs. I love using them, but I don't wanna write them so her, so they don't write me up. But there's things that we all do in our business that don't excite us, that have to get done.

And as entrepreneurs and business owners, this is where you'll [00:44:00] learn. , I don't like doing that either. Okay, now I'm gonna start to hire someone. That's when those executive assistants come in, because we can also let go of the things that have to be done that we don't enjoy doing, or that we're not the best at doing.

I, you don't have to be certified. I never tell people that you have to be certified, but I'm like, you want to be certified. But there are clear advantages to it, both for people who wanna be OBMs and for business owners who are looking for that kind of help. , can I just say one other thing, Joey, about that just so people know, when you hire a certified obm, I literally had a client where we had a

launch go wrong, and I'm not techy, couldn't get ahold of our virtual assistant because there was a storm coming through Costa Rica.

We couldn't get ahold of him. I went into my community and I said, This is the problem. My , seven figure clients, eight figure coaches promoting us. He's getting customer service cuz our website's not on, this is not looking good. He emailed hundreds of thousands of people for us. What are we gonna do?[00:45:00]

My community stepped up, got me names, somebody got in with me, she fixed it in 15 minutes. I said, Thank you. How much are you gonna charge me for this? We'll pay whatever you are charging us. And she said, Yeah, no charge. I'm giving back. You were in need. I'm happy to help another certified obm and I know that you'll pay it back.

This is, oh that's literally so great. So exciting. Because my clients then, like my client then knew that if there was a problem, I had backup. They didn't help her, they helped me and I had to support. And so it's interesting, certified OBMs have a community behind them to , help us out. , if they don't know the answer, they know where to find it.

That's such a great story. Thanks for sharing. Yeah, it's just, that's why it's , the benefits for me is just like, why would you not want to go through that and then have that support system? Yeah. I haven't been alone in 10 years. , and then of course I meet more people like you, Joey, in other programs.

And I, I love that, , there would never be [00:46:00] competition between you and I, cuz I could not step up as a lawyer for sure. , but we meet all these great people and so the relationship that you and I have just as an example that, , how you and I feel about each other and networking, it's like that in my community.

And I, I've had that for 10 years. So , it's wonderful not to feel alone, , in your business. Well, and I think it's great for business owners too, who are working with an OBM , to see not only if there's that great. Community vibe. , but also those potential cost savings of if , they can rely on an entire community if they don't have answers or if there's whatever.

I think that just really helps people feel good. It, again, in terms of thinking about this from a business owner perspective, , and I'm asking a question without knowing what the answer is. Is it possible to hire an OBM too early? And if you're thinking about this, is there any sense of clean up work or building the business to a certain point before you should consider bringing on an om?

[00:47:00] I am going to say yes. Okay. , if you're looking for a day-to-day obm, so someone to come in and partner with you and really help you manage the team, There is a point where it's too early. Okay. , sometimes OBM's will come in as a project and help you to get closer to getting ready for an OBM to come into your business.

Sometimes you just need someone to set up some SOPs or to help you hire your tech, va, help you to figure out what your plan is going to be for your launch. We can do those on a project basis when you're not ready for us yet. I have this kind of crazy rule of thumb, but this is how I think a business is ready for an OBM if you're making between 15 and \$20,000 in consistent revenue every month, and here's my reasoning, because we all get into business to make money.

So you need to be able to pay yourself. Yeah. You need to be able to pay your taxes. You need to be able to pay your team of doers. They're the most important people on your whole team. [00:48:00] And then you can pay for an online business manager or someone to come in and manage the team. They're. Hiring your executive assistant, your virtual assistant, those things come first.

The people that are gonna help you do the things in your business that you need to deliver to your clients without them doing the same work as you, but the person doing the email campaigns, or setting up your sales page or answering customer service. Those things that are gonna allow you to focus on your own client base and get better at doing that kind of work.

You hire them. Then when your team gets to the point where you're like, Oh my goodness, I have to keep talking to Susie over and over again. Or Susie keeps bugging me over and over and over again, , because she's got a couple of questions and I know I'm training her, but I wish someone else could take over the training of Susie.

That's new. Yeah. I don't wanna train people anymore. , Susie's, , daughter is sick and , I want to feel for Susie, but I'm so stressed cuz Susie was supposed to get this done and I don't know what to do. , we [00:49:00] come in to manage and serve and support the team. We're also taking things off of the client's plate.

But you are not ready for an obm. Also, if you're gonna micromanage. I also wanted to say that, ah, sometimes we're ready financially and we're not ready mentally. So if you, , are a micromanager and you're not willing to change, you're probably not gonna find success with an om. Just to be honest. If you're a micromanager who wants to change and you just need to learn to trust and have

someone learn to do it your way, yes, you can be ready, but believe me, , you have to also be ready for that online business manager to point out when you're overstepping again.

Yeah. Because they want to be your partner. They want to help you take things off your plate. But if you're going to circumvent them and talk to the team and not go through them, if you're going to micromanage everything that they do or the team does, , that relationship isn't gonna work because they're there to handle that.

And you're supposed. Stick to [00:50:00] what you need to do. Mm-hmm. . And sometimes entrepreneurs get a little scared when they are offloading stuff and delegating. It's like, what am I supposed to do with myself now? Yeah. That happens. And it's like you're supposed to do those things that you don't wanna do those uncomfortable things.

You have to have those sales conversations. You have to do some outreach. , sometimes we keep tasks on our plate as a way to procrastinate. I like, I raise my hand like people, I do that a lot. That's why I can call it out because I know that I do it myself. , but yeah, if , you, you might not be ready if you're not making the right income.

And so when I say 15 to 20, , let's just think about that. You're making \$15,000 revenue, not profit revenue, and you have to pay yourself. And then you have to pay your taxes and you have to pay your team. I want you to think about that number first. And then , when a business manager comes in, we're not cheap.

because we're literally trying to be like a mini you without being you. , Right. And so think of the responsibility and [00:51:00] ownership we're taking on. So maybe that number needs to be higher for you to pay yourself. And then I've had people say, , I just won't pay myself for a little while and I'll bring it in.

Om please don't do that. It, you are not gonna have a long term relationship with that OBM because if you can't pay yourself, you're gonna be unhappy. And then you're gonna eventually let go of the online business manager and they actually want to work long term with you. Okay. I was gonna ask you this in terms of that long term relationship, , and circling back just super quickly to traction, , and other books that not only talk about things that we've talked about, , in terms of this role or that role.

And yes, it's meant for maybe a larger business, but. It also talks about this sense of creating a leadership or executive team and trying to figure out every

year and every quarter what your main areas of focus are, your main goals or rocks, and ideally having something [00:52:00] like a quarterly retreat where that leadership team is stepping away from the business and thinking about these big goals and barriers and strategies.

if people are thinking about OBMs or maybe hearing this for the first time, it might sound a little bit like , a coach or a vendor type of relationship. I just wanna clarify, , is the OBM usually in those types of quarterly retreats seen as a part of the team , and really helping make those types of decisions at that level?

Or is there more of an just like an external vendor relationship? , no. , OBMs, I always tell people, so what we do is in our name, , we manage businesses. We're an online business manager, and we are meant to be in the business. So if you're in the business as an obm, you're managing the day to day. We are definitely part of the leadership and the executive.

Okay. We do things by 90 day chunks and quarterly reviews, and we do an annual review. We do all those things that you talked about. I'd love to do in [00:53:00] person retreats , with a team every quarter. That would be awesome. But sometimes it's just virtual. Sure. , if an OBM is acting in it as a consultant.

So they're coming in to use their expertise and tell you what they, what to do, but they're not doing it. They're helping you work on your business. And so this is always. Like , a, tech, a touchy point for me because I love being in the business. When I pick a client, it's because I believe in their vision and their client and what they're doing, and I wanna be a part of it and make an impact.

Yeah. And when you're hiring, when my clients are hiring someone, they're hiring me to manage the day to day they want me in it. They don't want the team reaching out to them for every little thing. They want them reaching out to me. And so the difference you need to look at is are you hiring a consultant who is going to help you work on your business?

They can come in and tell you, You need to do these SOPs. Yes, you need to have a quarterly plan. I'll help you a little bit with planning. But no, I'm not following up with Susie and Joe. [00:54:00] That's not part of what I'm doing. That's still on you. They're acting as a consultant. You're, you know, great clarification.

I try to explain this to my students when they like, cuz the consultancy is like the sexy term also right now. Sure. Everyone just wants to give advice and get out and, but they don't wanna call themselves a coach, so they're a consultant.

And I get it. Consultancy is something that I think is actually valuable and really great, especially when people are not at a certain level in their business.

But when somebody is really ready to scale their business, and this isn't about, , the dream of laying on the beach and working for four hours a week or whatever those things are, when you're actually building a business and serving an audience, you need team members who are gonna own roles and help you develop and scale this business.

Yes. And so the online business manager working in your business is really what you're looking for. People are hiring when they hire me and when they hire other online business [00:55:00] managers, they are trying to give away owner. Of the management. And so yes, it's great that you wanna tell them what they should be doing or what they could be doing, but they need someone to do it.

And then if they're told you need to do , this, and this, and just get Suzy, the VA to do it for you. , as a virtual assistant, you're responsible for very specific things that are in your contract that you're about to do. Managing is usually not it, because this is what, This is the difference of what, when I look at virtual assistants, we all need the different people on the team.

As an obm, I am staying at that 30,000 foot view. The CEO is like at 40 or 50, cuz we want them to stay up there. We're taking a little bit off. We're at the 30,000 foot view. The team members that are doing the work, creating the sales page, posting to social media, engaging with people, helping the audience, they're on the ground level and so they're doing the work.

They're doing specifically what's in front of them. They have a lot of [00:56:00] stuff usually on their plate, a lot of different things happening. To ask them to now quickly make sure that the person over here is doing this and doing that. And they're getting what , they need. Something's going to fail. This is, , you can't be 30,000 feet and in the weeds, like you have to be either up there or down.

And when I say down, it's not a level. It's like you're in the weeds doing the. We can't do that work without you. So those team members have to be on the team, right? So it's just, you want an OBM that's in the business. , I tell people all the time, they're like, Oh, I wanna be a, consultant.

If you love marketing yourself and always getting new clients, go for it. , for me, I get one or two retainer clients as an obm. I'm in your business. I'm in there

for years. I don't have to look for a new client. I call it like Someone talks about how do you have recurring revenue? Get a retainer client, it's easy.

Ah, there you go. Recurring revenue. , it's not a job. You're a contractor. You're putting in a certain amount of hours. You're still [00:57:00] creating your own business, how you wanna work. I don't have any client calls or do anything on Fridays. I close my office door at 3:00 PM I don't start work before 10 because I'm not a morning person.

I'm not showing up at a job. Right. So it is, yeah, if you're hiring an obm, you want them to come in and take things off your plate so that you can focus on areas of the business that are really relevant to what you're doing and what you need to do as the owner. Mm. Let's say you're the, Here's an example.

Like I was, use this example Coca-Cola, , the CEO of Coca-Cola. , I'm sure that he does not know how to operate the labeling for the bottles or the cans that come through the factory. , but he certainly understands data and numbers. , and he may not even, I'm hoping he understands it from Coca-Cola, but a lot of times they're given that data from their COO or whatever, and OBMs give that same information to make those decisions.

But he can still run a business without knowing how to do those things. But [00:58:00] he still can't run the business without people doing those. And so when you're in a leadership level, you're looking at the big picture, you're holding the vision. , and as a CEO sometimes you're going to learn, , that you've been doing this one thing all the time.

So maybe as a CEO you're making the sales all the time, but when you get to a certain level in your business, you can actually let that go and hire a sales person. But you're still the person who's really good at what you do. As we start in business, CEOs usually hold sales and marketing for a while and then you can maybe let go of some of 'em on the marketing.

But you're really good at sales still cuz this is how you started your business. Yeah. And then you might let go of sales, you might let go of coaching if you're a coach a little bit at a time over time where you get to just stay in the visionary role , and you know, drive the bus, so to speak. How you're gonna help people and what the vision is for the whole business overall.

And you can sit in that seat and it's not like a seat where you get to sit back and do nothing either. A lot of people think, Oh, I'm the ceo, I [00:59:00] don't have to do anything. Right. Maybe later, but that's not how it's gonna work in the

online world for some business. You and I could talk for hours about this, , and I appreciate you.

, I know we're going a little over here. , I have one more question just to really put a period on some of this stuff. , if there's anybody tuning in who's like, Oh my gosh, this is answering so many questions and clarifying so many things for me, it sounds like an OBM and is exactly what I've been looking for, but maybe they're not yet at that 15 or 20 k a month yet in revenue.

, is the answer there just focus on getting that revenue up, or is there like a, Part-time OBM option that you think people can start to look into if they're very ready to start to, , pass some of these management tasks, , off of their plate, you can hire an OBM part-time. , but I don't even think of, , anyone not making 15 [01:00:00] k a month in consistent revenue, even ready for a part-time.

Obm, I like them to hire someone on a project basis or for a package so they could come in and help you hire, they could write roll descriptions, help you set up your org chart, help you get the first couple of people in, maybe help train them up, get them ready so they could come in for a short project period of time, teach you how to manage the team.

If that's the case, make sure that some things are following up, they might stay in your business. How teach you how to manage the team? I like that because so many business owners, they just feel like, Oh, , I'm not good at managing. Let me find someone who's good at it. Or , they come away from reading rocket fuel thinking, Oh, I'm not an integrator.

I need an integrator. And yes, there are tendencies , and strengths, but at the end of the day, if you wanna be a strong business owner, You have to work on your management skills. And it's not as simple as, Oh, let me just fill that seat with someone who's really good at it, so I never have to learn it.

Yeah, you're gonna [01:01:00] have to learn it. You have to be a leader. If you're gonna grow a business and not just stay a one man show or one woman show, you have to, , learn to become a leader. And, , some OBMs can work like 20 hours a month, which is like five hours a week. And that one is, , I'm on the fence with that one because I'm like, if you're working one hour a day for five, I think that's pointless.

If you're working, let's say two days a week to just check in with the team and follow up and check the project management tool and meet with the client to see if anything's changed for the priorities. I get it. You can do it that way. That

means it's a small business owner. , definitely not ready for an OBM on an ongoing basis.

So there are OBMs that will help you in that capacity, but you pretty much have to have your SOPs in place. Your team has to be running pretty well. Yeah. To bring in someone with that little hours. That's my personal opinion. I know that other OBMs might disagree with me, but I love working in the business and so I'm thinking that [01:02:00] you need at least 10 hours a week, 40 hours a month with an obm Okay.

For us to really. Show you, , what we can do and manage the team and make the team feel supported to take things off your plate. , just meeting with your client once a week or once every two weeks for an hour. There's an hour. Then there's the checking the email, following up with the team. There's setting a plan.

It's one thing to set a plan in paper. It's another to put it into the project management tool so everyone can follow it. So , there, yeah. Is work hours in there. So I hesitate for people to hire too early if you feel like you just need a project manager. So someone who is not responsible for hiring, they're not responsible for leading the team.

If you really just need someone to come in and work the project management tool, then hire a project manager and all they're gonna do is push that project forward as an OBM on a team. I've had a project manager underneath me. , we did a lot of launches with one of my clients, which was really fun and great, but I was [01:03:00] exhausted.

And so we hired a project manager. So as I was finishing one project, I hired a project manager. This is what allowed me to take that vacation I was telling you about. And she came in and she ran, she did that one project, but she pushed it forward while I was looking at everything else and trying to clear my plate and get caught up.

Yes. So as a business owner, if you think that you just need someone , to follow up and work the plan, like the plan's in, they don't have to think of it, they just have to work the plan. You could hire a project manager and again, hire them for that project, that type, and they're managing projects, not so much managing people.

Correct. , at a high level, , one of the things that I'm loving out of this, and it goes back to what you talked about, , the great community that's been created among , the certified OBMs is that you can go to that community and say, as a

business owner, hey, , I'm looking an OBM on a project basis to help my business get to a place where we can have someone [01:04:00] full-time.

And instead of trying to find that unicorn open obm who's like, Yes, , I'll come in on a project basis and then we'll get you to a place and then I'll become your full-time. It's like we care about your business. So who is available and loves project based work and there's no. Drama or attachment to if they get transitioned to another OBM after that project is completed.

I love that idea. Oh, it really makes it easy and accessible for a business owner to not have to shop around to find a bunch of different options that all have to. Timeline up really well. , it's so true because we have some people who will say, , what they need to do to start is they really need to hire.

And someone might say, Hiring isn't my strong suit, so this OBM over here, like if you're networking, can really help you with that. And then that OBM might wanna transition and stay with the company, but she might come out of that going, You know what I mean? I did all [01:05:00] the work, but they're not my ideal client.

Let's find you a day to day obm someone who doesn't wanna market themselves. They wanna be long term. They wanna walk into someone who's got all their systems in place already. Hell yeah. Yeah. So let's do that , and plug them in. Definitely. That happens a lot. We have people , that know that's how , we get to know each other.

It's , what are, who's your ideal client? What do you really wanna be doing in your business? And then we, , sometimes , keep a list or whatever of who we can refer to. I literally built my business on referrals. I would have sales conversations with clients over that 10 years, even when I was full and working.

And then I would find out what they needed, what their personality was, what their business was. And then, okay, wait, I know two or three people, would you like an introduction? , and I actually still do that for people. So even though I am not actively working as an obm, I am, nobody's obm, I'm just training people to become online business managers now.

But I will still help people. , when they come to me. I wanna hire an ob. Well, I know where you can go and , they can go direct to the association, [01:06:00] but a lot of times I like to have conversations with people to make sure they're ready. Mm-hmm. , because I don't like it when somebody's expectation is that they've heard.

I'll get an integrator at that website and then it'll work out. I like to have really deep conversations about revenue. , what are you looking for? Are you really ready? And then I'll help them even fill out an RFP or then direct them where it is. And sometimes I just refer my students cuz that's the benefit of being my student, is yeah, I always look out for my students first.

So, , whatever, if I can, , if a student is a fit, I will refer them first. If they're not, I will refer them out to somebody I know that is a fit. And if I don't know someone specifically enough, I will refer them to the association because there's like hundreds of certified OBMs that you can choose to pick from.

So a lot of people are just getting hired from the directory. Man, that's so great. , and again, just to clarify from the business owner perspective, if they want to put some type of a job posting out or reach out to you, Kel, or maybe someone else, is there a cost that goes into just [01:07:00] saying, Hey, I'm looking to hire someone.

No. So I don't charge for that service. Some people do, because I do it for my students as well. I am willing to talk to people to educate about hiring an obm. And I don't charge. Yeah, it's like I don't charge. I probably should, but I don't charge . It's a topic for another chat. Yes, it's exactly another chat.

, but if you go to the directory, you can just search through and filter for keywords if they mean, or time zones, and they can just find them there. , I have a private Facebook group called OBM Life, and unfortunately, clients are not allowed in. , it is only for virtual support professionals so they can get direction.

We talk about clients and it's a safe place for them to talk, , without their potential clients necessarily seeing them. it's, , a fit, if we've had a conversation and I think that you're ready to hire an OBM and I'm not specifically referring you to someone, I am happy to create an RFP and post it in my group.

Oh, that's so I do that. , so great. Yeah, man. Well, , I'm so. excited [01:08:00] for everybody who's gonna be tuning into this episode. I know that I'm gonna be, , promoting this in different circles that I'm in after this because I've had so many conversations , at both levels of, , the VA doer level and also the kind of upper management level conversation of, I need help.

I need other sets of hands and brains to help me do this. And I think that, , despite the kind of trending terms that are happening right now in terms of how a business , can help pull in certain positions, , I do think that. Number one, this

distinction of the different language of executive assistants and personal assistants and tech or administrative assistants is so helpful.

And then this, , this new way of thinking of an OBM as a , Potentially, but probably better fit than looking for someone who's calling themselves an integrator or a fractional coo. If you're not yet at [01:09:00] that size in business that those types of books are really based on Tell the, I always enjoyed chatting with you, but this was such a great conversation.

Thanks again. Thank you for inviting me to have this conversation, cuz I always love chatting with you as well. I think we share a lot of the same values and I just think it's really important for everyone. , not even necessarily higher for the term or the role. Yeah. You like, , you need to understand what you need in your business, what you're looking for, and then that's your job posting.

And there are certain people that can plug into those roles. But, , we talked about, you mentioned the ego thing, so I just wanna say that again, don't hire for the ego term. Please don't hire for that term. , yes, you need to hire for what you need in your business and what they're going to be doing, But then with that in mind, please don't expect one person to be able to do all of those things.

There could be some magical unicorns out there. As much as I want to believe in them, they really don't exist. And if they do exist, they're not the best fit for your [01:10:00] business. They might not be. Yeah, for sure. No, , but we talked about with that value set. Yeah. , one of the things that I'm learning is the importance of coverage.

Because , if you do find, and I don't wanna say there aren't great people, but if you do find an amazing superstar for your business, They're not gonna say it your business long if they feel like they can never take time off. Correct. Correct. Yeah. So there's no unicorn in that sense. So I totally get it and I, as much as I want to believe.

Sure. , I can't believe, , we are all special , in whatever way we come to your business for, , we're looking at the role and what, the, expectations are. Please be very clear on expectations and measures of success. Those are really Important. And please also don't look for an OBM who you think is an OM slash va.

OMS are there to manage and stay in the 30,000 foot view. Yeah. If you keep pushing us down into the weeds, things are gonna drop and then you're gonna be unhappy. Like, why didn't you catch this? Well, cuz I'm down here doing the

work and pushing the keys on the keyboard [01:11:00] and looking intently at something.

And I'm sorry, I didn't see the email that came in from someone else that this got canceled or whatever, because we're not. Staying in that 30,000 foot view. So that's just one more thing about an all in business manager. We don't do it all. And that you're asking us to be a unicorn if you're asking us to be techy and doing the stuff and staying at the 30,000 foot view.

So if you're gonna hire us to do that, then you're hiring us to do that role of setting up your tech. Mm-hmm. that is not hiring. You can hire an obm, Let's just say you can hire an obm, but you're not hiring them to be an OBM in your business. Yeah. When you're asking them to send out your emails and set up your sales page and do your funnel, you're hiring, that's a different role.

You're hiring them to do. So they might hold that title and have those skills, but you're not hiring for the role of an OBM if you're asking them to do work that's in the weeds. Yeah. , super true , and helpful. Again, Kelly, I, , I know this is going to be a [01:12:00] heavily watched and listened to, , video over the years, so thank you again for your time.

, everybody, I will be here again next week with another episode of the Business Growth Advantage. We are gonna continue to lean into these team building topics moving forward, and I know I've said it a hundred times, but just such an honor and a blast to have Kelly on. Thank you so much. , and I'll again, I'll see you guys all next week.

Hi, everybody.