

Episode 91: VA Training Masterclass

| Part 4: The Alignment Check

[00:00:00] Hey everyone. Welcome back to this masterclass series. All about how to train and onboard your overseas VAs. Let's dive in. We're [00:01:00] currently. In part four we're pretty much done with everything. this is the last phase, the alignment check of what we call our epic welcome. Let me focus on the slides here and we can keep moving on.

So I always wanna start these tradings out by stepping back, zooming back and reminding everybody of what the overall context here. Which is we are building a VA hiring machine for you. And here are the main four components of that VA hiring machine. So first you have your application funnel. Then you have your auto qualifier.

Then you have what we call your inspiration interview. And finally your epic welcome now as. As I hope, if you're in the Facebook group and if not, make sure you join the Facebook group, we have. Resource for all of you called the a to [00:02:00] Z hiring guide for VAs. And that covers most of these components, but this last and final cog in the machine and the epic welcome is such an important and human element of this machine that we decided to create this series around, finishing up this epic welcome.

And so that's what the onboarding training is all about. And. The onboarding framework that I use, that I've had so much success with. And that I recommend that you all consider is again, this epic welcome. And it has these three main parts. We've already gone through the first two, what we call the captivating orientation and then the first victory.

And so in this training, we're going to go through this third and final piece of the epic welcome, which is the alignment. And in case you, missed the past trainings or just want a quick recap, [00:03:00] here are the main points to recall from that captivating orientation piece. We've talked about having that welcome email that you send to your new VA, your new teammate, We talked about those official invites that you wanna make sure that you're sending them, having a kickoff call with them.

And then if anyone wants to go really to the next level with it, we talked about this team portal that you can introduce and use with your team. The second

piece we call that the first victory and the main components. There are number one, the mission number two, the map number three, the celebration.

We'll make sure that you have easy access to that. First victory section, if you wanna go back and learn more, and the next level of strategy there is the team agreements. So when I say team agreements, something that goes way beyond the contract that you have them sign or agree to. This is once they come on board you and your [00:04:00] teammate working together to say, okay, what would the ideal outcome of.

Working really well together. What would that look like? What would that allow us to accomplish? And how can we both agree that we are going to promise and commit to things for really next level success in the business, which brings us to this third and final piece, the alignment check. Now here's a brief overview of what we're gonna be diving into today.

First, I want to cover, I wanna cover what I call the finish line mindset. Oh, this is so powerful. And. You don't take anything else away from this training. This finish line mindset can really change the way that you think operate and lead your team. Number two, we're gonna do a core value, deep dive, in large part, because that's so important for this third and final piece, which is the alignment check itself.

I'll show you guys what I mean when I say that. And then if you wanna take this to the next level, you can revisit [00:05:00] those team agreements. I'll cover that again in this video. So let's talk about this finish line mindset. Now, if you're like most business owners, most leaders of teams, when you bring someone new on, it can feel like this, like you're at the beginning of a race, like you're just starting to think about, okay, what do we do from here?

We're just at the beginning. When you look down this journey, this race together with your new teammate, things get blurry, right? It's hard to see beyond these first initial two steps. And it's something that a lot of business owners. They think about their new team in this way. And it causes a lot of strength, stress, and anxiety.

And I, I get it. I've been there thinking, okay, what if it doesn't work out? What if they ghost me? What if they steal from me? What if they can't follow instructions? What if they can't speak as good English as I thought that they could. [00:06:00] And there's all of these, what ifs, and also. Even if they're amazing, what if I don't have the processes in place, what if I'm not strong enough of a leader?

What are the things that I need to do to make sure that I'm delegating work to them properly? This can obviously understandably feel like a really heavy space. So at this time, when we're thinking about this alignment check, which is really my version of what a performance review can be. I know that you're just starting with your new VA, but I encourage you and invite you to zoom ahead.

And even though you're at this starting line with them right now, picture the finish line. Mentally take yourself to the finish line of, let's say a year from now, you're crushing your business goals. You have an amazing team around you, including this new teammate that you have, and you've reached whatever this big milestone is that you've been reaching for in your business.

Maybe that's a revenue goal. Maybe that's a certain vacation that [00:07:00] you can go on. But put yourselves in the shoes of that person, crossing the finish line and look backwards instead of having a starting line view of what's next begin with the end in mind here, put yourself on the, at the finish line and look back and think, okay, what are the milestones that we will need to hit?

What are the certain markers that we need to run? In order for us to get to this finish line. When you think about it this way, it takes the stress out. It makes it more of a game. It makes it more fun, and it keeps you in more of a positive mindset. This is one of my favorite quotes and it's true for a lot in business, but it's particularly true for team building begin with the end in mind.

Again, this is an amazing golden nugget that you can take with you and apply to all aspects of your business. That being said, let's shift to what I call the core value. Deep dive. Now, if you're [00:08:00] tuning into this video of you might be listening to the podcast recording that we're doing, you might already have core values, but I'll tell you the most business owners that I talk to don't really have clearly defined core values.

And those who have core values, haven't taken the next step of putting into their own words. What that core value means. They might have certain words or phrases that they've identified as, oh yeah. This is really important to the business, but they never really took the time to really deep go deep with it in a way that makes the values helpful and instructive.

So these were the success steps from the last video. Maybe you're you've been a good student. You've done the work up until this point. If not, we can do this together in real time. But identify what your core values are, which already puts you light years ahead of most business owners, but then go even further and define in your own words, what your core value.

Core values mean it's [00:09:00] really important to define what your core values mean, because if you don't well, some people just because of the way that the English language works, they will apply their own definition to it. Third, explain how each core value can assist your team in making decisions and modifying behavior.

I'll circle back to this in just a bit, and then fourth and finally specify what it would look like for someone to be a shiny example of each core value. Let me add some more language here to make it really clear. Number one, I recommend that you identify your top three to five core values. That can be either words or phrases and write out a few sentences describing each core value in detail in your own words.

So one of my company's core values is integrity. We define integrity in a pretty unique way, pretty differently than most companies define it. And it allows us to make sure that the team is on the same page about it and ensure that each of your core [00:10:00] values are instructive in practice, not just fluff.

What I mean there is I ideally and really necessarily. Your core values. The reason why they're so helpful is because when you or your business or your team are running up against certain issues, your core values should be your north stars. If you don't want, know what to do next sure. You can have a coach or mentor or whatever, but really there's a lot of self guidance that you and your team should be able to make because of your core values that are in place.

They should be pragmatic and practical for you. If you're starting to think that, oh my gosh, these are just fluff. Then take the time to either define them or maybe go looking back and say, okay, based on what our business is looking what are those core values that are rising to the top? What does that mean for us?

And then fourth, and finally here get clear on what a shining example of each core value [00:11:00] looks. Take some time here and really think if someone was, if they got a golden star on your team, for just being the epitome of that core value, if they were, the teammate of the month, because they were doing such a good job of living out that core value, what does that mean?

Action wise? What would their behavior look. Take some time to write that out as well and flesh that out. Okay. Now that you've done all of that, that makes this part super easy. Again, this whole training, this whole specific video is called the alignment check. We'll get into why I call it that, but this is really my take on a performance review.

Most businesses have something like a performance review. But this alignment check is way more. Inspiring as an alternative to a performance review because it cultivates confidence and empowerment in your teammate. You're probably hearing a lot of business owners these days, [00:12:00] myself included saying that we hire based on culture, not skill set.

This is to way to put that saying into action and to make sure that you are practicing what you preach and walking your talk on all of this. Because if it's true that you are prioritizing culture over skillset in your business, then when you are reviewing your teammate's work, then you should be prioritizing culture.

Over the actual work that are they being a good culture fit. And I'll say this too, that I totally get that for other types of hires, especially for more expensive high investment types of hires. There will probably be aspects of skill sets that you'll wanna be reviewing in a review. But this alignment check is particularly effective for admin level teammates.

When I say that, Admin level teammates, these overseas VAs. The idea is that you are freeing up your time and your team's time by [00:13:00] delegating to these overseas VAs \$10 an hour tasks or less. It should not be hard for them to do a good job following instructions. And honestly, if they are having difficulty following instructions, especially if you've done a good job qualifying embedding them, then that probably has.

More red flags around your systems and processes than their abilities. Having said all of that again, I just wanna underscore that. That is why really highlighting culture fit and core value alignment is so helpful and powerful for these overseas VAs. So how do you do it? You really bring and mu everything together that we've talked about.

This does not have to be difficult. So this is an example of, it's a very simplified example, but you can take this and build it out for yourself. So it's a really simple spreadsheet where at the top, there's the core value. The, our definition of what that [00:14:00] means, and then a space for the teammate, the new overseas VA to give their rating of where they're currently at.

And then you, as the supervisor can replace that word with boss or visionary or leader or whatever that is where you put your rating of them. So the idea is you would hop on a call together. You would go through this document together, and you both would just fill out those ratings ahead of time.

By the way, I love this rating structure of you either give them a plus a minus or a plus minus. So a plus means that they're doing a really good job. A minus means that there's a lot of room for improvement and a plus minus. Is you did it, you're doing fine. Yeah. There's some room for improvement here, but, you're doing a good job working on it.

And usually what we wanna see here is pluses and plus minuses across the board. If there's a minus in one or more than one core value, then that really is where the attention needs to be. So [00:15:00] let's walk through what this could look like. I'd be having this conversation with one of my VAs and we would say, okay, the core value first that we wanna talk about is integrity for us.

We define that by honoring your word and being more focused on being effective than being right. In other words, not being a person who casts blame on someone else, someone who's very proactive who takes accountability and honors their word keeps their promise. And both me and the VA say, okay, you did a great job given we're gonna give you a plus here.

You're really living that out. Then it comes to ownership and here's how we define that. We empower each other to take extreme ownership of their roles and their lives. And then this is our spin on the popular Spider-Man quote with great responsibility comes great power. And let's say in this case, the VA gives themselves a plus here.

And I say, you know what? I actually am gonna give you a plus minus because I do see some room for [00:16:00] improvement. I think you're doing a good job. But let's talk about what it could look like for you really to get a plus here. And then the third example on this one is clarity. So we define that as putting facts over feelings, and we seek to understand before we give opinions.

Let's say that this VA is just really hard on, on themselves and they give themselves a minus on this. But I say, no, I think you're being too hard on yourself. I think that you're at least deserving of a plus minus. But let's talk about what it, again, it could look like for you to be a plus. Now, this type of honest, transparent conversation around core values can be so next level helpful, especially if you pair it with what we're about to talk about, because if you wanna take this to the next level, then you can revisit those team agreements that we had talked about in the last video.

And as a quick recap, we have a, really. Simple easy to use template that you can access from the past video, [00:17:00] which is what we call a team agreement. So again, when I say agreement, this is way beyond like the contract

that they sign. This is more of, we're basically we're agreeing. That both of us are going to be living out these core values.

And here's what that means. So you can see on the screen here, we agree to respect an extreme, no gossip policy. We clarify what that means. We agree to be on time and prepared for team meetings. We agree to be transparent, honest, and candid. During performance review meetings, we put facts over feelings. We agree to work from a mindset of big dreams for the future.

We agree to honor our word. See, you can see how all our own core values were instructive in us putting together this document. The reason why I'm bringing this back up again is because this really should be a living, breathing document. Ideally you'll have one of these spreadsheets or at least a tab for each one of your teammates.

And so during every single alignment check. You can pull this out and say, [00:18:00] okay, do any of these need to be tweaked? Should we be adding any, what can we be doing to, stay in agreement with each other? So that next time we do this, maybe, three months or quarter from now, we can make sure that we're seeing your core value scores go up and.

So that is the alignment check in a nutshell, again, it's our more powerful spin on your typical performance review. And it includes that finish line mindset, beginning with the end in mind doing that core value, deep dive, which pro allows you to then have a really easy alignment check exercise.

And then if you wanna take it to the next level, using those team agreements and revisiting those circling back to 'em. And that's it. So if you've made it through all the trainings, you now have access everything that you need to do. Action steps regarding the captivating orientation, the first victory and the alignment check.

If any of you have any [00:19:00] questions, feel free to let me know when the comments, my team and I are here to answer, two quick steps for you, if you have not already done. So make sure that you join our free Facebook group, the business growth advantage you can search and find that at [facebook.com/groups/business growth advantage](https://facebook.com/groups/business-growth-advantage), or, and, or step two is to check out global vetted VA.

So if you're hearing this and you would like help in making it as easy as possible for you to be connected with vetted VAs overseas, that you can easily hire and bring on into your team. Global vetted VAs is not a VA agency, so it's

not like you're hiring an agency and we. Give you certain VAs that are already on our team?

No. This allows you to onboard your own teammate. We'll use our process to match you with five vetted VAs. You can easily hire overseas talent for well under \$10 an hour, using this [00:20:00] service, if you haven't already done. So feel free to type the word, call in the comments for a Strat strategy session and my team, and I will do what we can to help.

Just figure out what next steps would make most sense for you as you're building this dream team for yourself. All right, that'll do it for this one. You guys are great. If you have any questions, we are open to doing a, final training around all of this. There, there might be some. Extra, follow up questions, topics and things.

If there are, then we have reserved space next Tuesday to do a training around those advanced things. If not, then this will be the end of the training series. There's been a lot in this series. We are repackaging it to make it, very easy and accessible for all. And you can, find a link to that course, where we've repackaged all of these videos in a very easy to [00:21:00] digest, easy to binge place for all of you.

All right. That'll do it for this one. Thanks.