

The process for scaling your team

All right guys. In this video we are gonna talk about the process of scaling our sales team. This is a 30,000 foot view of the overall evolution of it going from you being the only person on the sales team, all the way to the point where you have a massive, massive, massive sales team where they're doing everything for you and they're being managed effectively, and they're just producing, you know, cash flow at a rate that you never thought possible.

So this literally is going from the point where you're only have a couple of, you know, appointments on the calendar, and you're this small little company to the place where you're doing multiple, multiple eight or even nine figures a year with this process.

So it starts out as just you, right? You're a one man show and you're setting and you're closing yourself. You're self setting, you're setting the leads, you're setting them to yourself, and you're closing out.

And then here's what we're gonna do. Once you approve the process, you start hiring setters and you continue setting in your free time.

When I say once you prove the process, what I really mean by that, and we'll talk about it more later, is you prove the process of being able to get numbers at a place where it makes sense to bring on setters to where you're able to set people at a high enough rate and close people at a higher enough rate that when you start hiring setters, you're not hiring them into a broken system, you're hiring them into a system that is proven to work a system that literally, if you have your full-time job doing that, you can produce insane amount of revenue, whether you're a setter or you're a closer.

So once we prove the process, we move to this, we start hiring setters, and guess what? We might have to hire quite a few setters before we find good ones, right?

We might have to hire them and then fire them. But eventually you'll get to a place where you have enough setters to fill your calendar and become a full-time closer.

So you'll start hiring setters. You see how they perform. If they're doing well, keep 'em. If they're not doing well, you fire 'em and you hire a new one.

You'll get to a place where you have a full calendar, right? You show up every single day and every single day you pick up your phone to look at your schedule, and you got 10 appointments on the board, or 12 appointments on the board, and your calendar is jam packed, right?

Imagine when you get to a point where you have full calendar for the first time ever, and you're not the one setting feels really, really good, right?

You can produce a lot of revenue doing that when you're at this point, if your machine is dialed in, you should be doing probably around seven figures.

Truthfully, if you're doing less than that, there's some pieces for sure broken. And then the next thing is this. You choose who's next in line to be closer, right?

You say, Hey, who's the next set in line to be closer? And if there's no one, there's no one who's even close to the skill level to be able to do it, what do you do?

You bring out more setters and you, you fire the lower performers and you keep hiring talent until you find people who are like, this guy could eventually be a really good closer, and then that person is next in line to be a closer.

And then what we do is this, we keep hiring, even though our calendar's jam-packed, like we can't take any more calendar slots, but we hire more setters anyway, and then we're gonna have some leftover calls.

And what we do is we reroute those overflow calls to the next set in line, who's meant to be a closer.

And then what we look at is the performance. Do they perform? If they perform, you guess what? You're in a really good spot.

If they don't perform, you're gonna reroute the overflow calls to someone else. You're gonna say, Hey, sorry, you're, you're not performing.

We can't afford to burn these leads. We're gonna pick somebody else who we think is gonna perform. And again, they don't have to perform as good as you, but they just need to be performing at a really solid, acceptable rate.

And then here's what we do. Once you have enough setters to fill their calendar entirely, meaning they performed, you're like, oh, great.

They can replace me, maybe not entirely as effectively, but they can replace me. And we keep hiring setters until we have enough slots to fill their calendar entirely, right?

Until we have enough appointments being set on the board for them to have a full calendar the same way that we did.

And now, guess what? You're out of the sales team in terms of actually being on calls, right? You have a closer who takes calls full-time, and you have setters who set full-time and you're not taking the calls yourself, which gives you a lot more time to focus on the other constraints in the business and actually scaling the sales team rather than being a part of the sales team.

Now we simply repeat the process. We select who's next in line to be closer, number two, and then what do we do?

We start hiring more setters. And when we have overflow calls where this closer can't take any more calls, we simply pass them off to the next closer in line.

That's it. Super, super simple. Again, if they're not hitting kpi, we say, Hey, sorry, if you're overflow, calls are getting cut off, we're gonna have to get 'em to somebody else.

And you figure out, all right, who's most likely to be the best closer? And it's this guy, right? It's the new guy who came on board, like he's, he's way better than everyone else.

It has nothing to do with how long they've been on the team. It's about how well are they performing? And you listen to his calls and you're like, he's good.

So you reroute the calls to him and then all of a sudden, boom, they're performing, right? That means you have two people who are closers now, two people who can close deals if you put appointments on their calendar.

So you keep hiring setters, right? You just keep hiring setters. And once you have enough setters to fill both of their calendars, you move 'em to a full-time closer and you strip the calls between them evenly. So all of our setters are now setting to a a calendar pool that just basically round robins between the two of 'em.

You get an appointment, you get an appointment, you get an appointment, you get an appointment, and at this point you have two full-time closers with full-time calendars.

And you should be doing multiple seven figures a year at this place, right? If you're at this place right here, you should be doing multiple seven figures a year.

Now, you might need a couple more setters than this. Maybe you need less setters. That's gonna be really dependen. But if you have two full-time closers with packed calendars, you should be doing multiple seven figures a year.

And then over here, what we're gonna do is we're gonna keep repeating this process, hiring more setters, picking who's next in line, moving another person to closer over and over and over again until we really start to get to where it looks like this, right?

And when we've repeated this process enough of picking the next closer in line, rerouting the overflow calls, and hiring more setters and moving them to full-time closers and keep repeating this process, what's gonna eventually happen is they're gonna be closing so many deals every single day that it might just make more sense to have someone else take care of actually the financing process.

The same way you go into a car dealership and the sales guy is different than the financing guy. It's the exact same thing.

So what we do is when we get to a place where we have tons and tons of deals, right? Once you have enough deal volume, you move one of your setters to a full-time finisher up here, right?

A full-time finisher to make the machine even more efficient. And the reason why we do this is two reasons. Number one, closers can take more calendars cuz they, they don't have to be on the calls to people this long.

So they can, they can do deal after deal after deal faster. And number two, what it does is there's a better frame.

We have less people back outta deals because now they feel like they're getting onboarded, right?

They're getting onboarded. It's hard to back out when you're on with the onboarding specialist, which is the frame that we usually use with the finisher.

So this is what the kind of the final evolution looks like. And then past this point, what do we do?

We just keep repeating the process. And then if we have it to where you need more volume, or sorry, you have so much volume, one finisher can't handle it, you bring another set up.

And we just keep repeating this process over and over again of picking the next setter in line, hiring more setters, giving them the overflow calls, and then once they prove themselves, they become a closer.

And then we keep hiring setters and we keep repeating the process over and over. That is the evolution, right? So that's literally going from the place where you're starting out just really small and it's just you on calls and you're setting yourself to prove the concept.

And even if you're like, oh, I don't have time to set, it's like we're just trying to get proof of concept.

So we're not hiring people into a broken system, which we'll talk more about, but we bring on setters, then we bring up more setters, and then eventually you're no longer setting, right?

And then we figure out who's our first closer in line and we start giving them some opportunity. And then once someone's proved themselves, they become our first closer and we're no longer in the business, we're no longer like on sales calls in the business, and then we pick the next setter in line to be a closer, we hire more setters, we give them opportunity.

If they perform, they become the closer. If they don't perform, we cut 'em off and we give somebody else that opportunity and we have them keep setting.

And then eventually we'll have two people, sorry. Once we find somebody who's proven themselves, we'll have basically two full-time closers.

Once we hire enough setters to where they can both be on field full-time with a packed calendar, and all these setters are just setting to a calendar pool that evenly distributes the appointments.

And we just keep on repeating this process over and over again until there's so much deal volume, it makes sense to bring someone on full-time for that up here.

And then guess what? We keep repeating this process over and over and over again. And it's, it's no different to get from seven Figures to eight as it is to get from eight figures to nine.

You just have to keep on scaling, that's it, right? Spend more on ads and then when there's more, we, we hire more sales people and then we make sure fulfillment doesn't break.

We do those things. Boom. You can scale as much as you want, right? When your ads are profitable, we have a scalable traffic source.

You just ramp up lead flow, you hire more setters, you hire more closers, you hire more finishers. And then guess what?

All that's left is fulfillment. If we have scalable fulfillment, it shouldn't break and we should be good to go.

This is the overall evolution from a 30,000 foot view of how we're actually gonna practically grow the sales team, right?

Cause a lot of people, what they do is they just hire a closer and they throw 'em on field and they see what happens and they hire a setter and it's just this disorganized mess.

We're gonna follow this super simple process of going from one stage to the next stage, to the next stage, to the next stage, to the next stage, to the next stage.

Until pretty soon we're here and we're doing multiple eight figures. That's it. Super, super simple. Yeah, you guys just follow this process to a T.

You will have a rock solid structure of a sales team. And then what you do is you just have a manager out here who's just managing the whole thing.

And it gives you the freedom to not be in the sales team, but be rather be working on the business.

Overview Document

Okay. Hello everybody. Hope you are having an excellent morning, afternoon, evening, whatever time it is for you, when you are watching these wonderful videos that we put together for you on this incredible offer of air that we, we have. So my name is Terry, and I will be taking you through this initial overview plus another few videos after this about hiring and recruiting and retaining amazing a player talent. And then I believe my, my good friend Logan, will also be jumping in here for a few videos to help God hit you through. So let's let's rock and roll, shall we? So, recruiting, hiring, and, and retaining talent what we're going to cover in the overview in this section is obviously the importance of talent. A players only don't recruit be or C players unless it is very, very clear that a b player can easily transition into an A player fast as a player, simply someone that can crush straight out the gate.

Doesn't really need more of an explanation than that, although we will do more of a deep dive as we go through this glorious section of the offer. So an A player is simply someone that crashes straight out the gate, the main characteristics you wanna look for, hunger and coachability humility incredible integrity and great intentions. Fantastic energy. Again, we'll, we'll do a deep dive into more of this stuff as we get going. Those are very kind of surface level, obviously. What's the word I'm looking for?

Parameters, let's, let's say, of what you should be looking for setters and let's, you know, let's talk a little bit about setters here. Setters are not this, this is a huge mistake that a lot of people make. Setters are not an entry level position. They are the front line of the organization, right?

The first point of contact, I would say arguably the most important part of the entire organization. So you want to pay accordingly, and you will see that r o i, if you're paying accordingly, I guarantee it overpay to get it right in the beginning. As the business is ramping up, don't feel like you need to stick to the industry standards of 10%. Do do 10% plus spiffs, for instance, which are sales performance incentive funds on a weekly or biweekly basis. In the past, we've done 15 to 20% even to get the offer going, get that fire burning and get it off the ground up and running. How many other cliched things could I say right there? But this helps with retention. It'll fill in the gaps in income from slower weeks for your setters. And by the way, I'm saying setters here, but a lot of this applies to the other positions, closers and or finishes if that is something you are potentially using.

So once you are ramped up, you can have a more standardized commission structure, which again, will cover later on. But you have to <laugh> about to say something super obvious here. But you have to work really hard in the beginning. You have to be open to letting go of people. And the, the harsh way of saying that is to fire people. Some of the worst business decisions we've made very on earlier on in our portfolio and our journey here was hanging onto the wrong people for too long. So, again, understand at the beginning is probably the hardest it will ever be. I mean, entrepreneurship and starting businesses and scaling is, is always a beautiful merry go. The merry not merry go round, let's say rollercoaster of emotions and up and down, but but the beginning especially is when you really want to put your nose to the grindstone, nose to the grindstone.

Yeah, I think that's the same. So the beginning is, is always, always hard. So if people aren't a good fit or you haven't mastered recruiting a players, don't hesitate to be swift in letting people go and communicating effectively and authentically and genuinely with the right framing as to why they were let

go. Again, that will come later on in the trainings here. So, a bad fit culturally is a, is a quick way to drag your best fits down. So what are some of the other things that we'll go be going over in this, this module or these modules in this section is talent. You know, what to actually look for and where to find it. Track record. What are their trajectory? What is their alignment with your mission and your core values? Something so integral and important to the organization as a whole.

Again, where to find the talent and how to have potential hires apply. We'll get into Facebook groups, different social media. I mean, for instance, Facebook groups are a free and easy way to seek out very high level talent. You just need to know how to effectively do that, right? So if you, I mean, if you, if you've ever done any type of Facebook recruiting, you've gotta be the ones that they stop scrolling on, right? So there's so much information out there, so many different opportunities. What makes you stand out? A lot of people under, oh, don't wanna go down a rabbit hole here, but everyone think thinks they or a lot of people think they understand really what a brand is. But when you really dig down into it, like

What is your unique voice? What makes you so valuable? What is it? What are your u VPs, your unique value propositions that you can shout from the rooftop, from the, from the beginning to the end of your, your funnel, from the first time they see you on Facebook, right through to recruiting and onboarding them and all that stuff. Anyway, I'm going down a rabbit hole. This is just the overview. So <laugh> another huge way to recruit is obviously referrals. Once you've started initially building your team referrals are absolutely the number one way to recruit. And the number one way we as a portfolio have recruited. So 90% plus probably 9% plus of our team have been through referrals from existing team members on our team. And if you if you read any blogs, any of the best books on recruiting, they all lean heavily towards referrals.

Now, there is a right and a wrong way to do that, which again, we can we can dive into in the latest sections. So how to get them to apply, we'll be going into that. How to follow our step by step SOPs. We'll give you all of our standard operating procedures and use our templates, our, our or templates. I always forget which, which one you guys use. I'm English, you guys are American templates, templates I could never remember provided in in our talent section what to look for and, and where to find it. The journey of a new hire, because you wanna just give them a phenomenal world-class experience from the first point of contact through interviews, through the onboarding process to starting on the team. Every part of the process should feel absolutely amazing and incredible. And that, that unique voice that I, that your, your brand who you are, it should, it should just be echoed everywhere.

They should be on a journey of being like, I can't believe I'm about to work for these incredible guy, or even have an interview with these, this incredible organization. I'm so fired up, I'm so pumped. There should not be any lag time between those feelings. There should be no hot cognition dissipating dissipating when they're going through your incredible hiring and recruiting funnel, and let's call it a funnel. They're joining an elite organization, right? Think of it as, as they're joining the, the Navy Seals or an elite like black Ops unit, right? We'll have all of our docs to to reference and help you hire and recruit in the best way possible. So let's dig into it, guys. I'm excited for you and let's let's, let's, let's figure out the best way to get the most incredible people part of your organization. Let's rock and roll.

Talent: What To Look For And Where To Find It

Welcome to the next section, this module. My name's Logan Morrison, head of recruitment at Air. You see my partner, Terry Shand, who's done an absolutely unbelievable job of covering the other sections in this course. And this has gotta be one of my most passionate things to teach on, because this is one of the major components of how to actually locate the people that are going to be coming into your organization, making a massive impact, and essentially joining that family that you're gonna be building over the next months, years, and decades to come. So that being said, let's dive in.

So what we're gonna cover in this section is, it's simple, it's talent, right? It's gonna be what to look for, it's going to be where to find it. We have a bonus section on actually cultivating applications and then as well as essentially cultivating it through referrals. So what I'm gonna do is I will be reading through a vast majority of this document, I'll be clicking into a few of the different components and essentially the main goal of this section is to really understand how you can use this document and how you can use our tools and our resources to fully integrate into your business and get this section down to a point of mastery. So, let's start off with what to look for. Now, there's two ways to look at how you're gonna be recruiting and how you're gonna be bringing on new talent to the team.

Number one, which is what a lot of people look for, is track record, right? They want the best setters, they want the best closers, and we found that it's not as important with the amazing training that we have in place. What's most important to us is actually looking at the trajectory of a human being and saying, is their trajectory actually in alignment? Are they someone who's insanely hungry? Are they someone that wants to grow an insane amount? Because that person that comes in that's super coachable, that's super hungry, that's ideally incredibly passionate about your specific business, is going to make a much larger impact than just a hired gun that's gonna come in. And, you know, just go through the motions and, you know, they'll probably put up good numbers. But at the end of the day, the culture you wanna build is generally gonna come from people that not only have a good track record, but also have the trajectory and the passion that you want somebody to have when they're coming onto your team.

So, you know, we would take somebody that is young and hungry with zero experience over a 20 year vet, as long as they exhibit and are aligned with our core values. Now, again, track record's great to make a decision, but it's not the only information that you wanna be using. You know, for example, someone has an ego, they have a great track record, but they're coming with an ego, or they're coming in with expectation, and they're, they're expecting just to be, you know, top dog. That's, that can be a double-edged sword, right? You can even you can end up eventually dealing with the ego side of it, where now you're managing this ego and this person that just thinks that they're the best, that thinks they're gonna come in and, and produce at, at the highest level, instead of somebody that's gonna come in and be humble and be grateful for the opportunity, and absolutely work their hardest to make sure that they make the biggest impact within your organization.

So the number one way to figure that out is, is simple, right? It's alignment with mission and alignment with your core values. And one thing that we do, you can click on the example video as you're going through and as you're watching this, we actually have an example video that Terry does an incredible job of breaking down each and every single one of our core values. And they watched this video before even going into the interview process. So they'll have context on the offer, they'll have information on, you know, commissions, all that fun stuff based on the post, which we outlined here later on in the document. But they're gonna literally see what does it look like to really embody the culture? What does it look like to really be a good fit? And those are the people that you're gonna wanna look for, and those are the people that you're gonna eventually end up hiring because they're gonna make the best impact and be the best fit for you.

So a note here is when you're going into something the industry standard of, you know, industry standard is something that we, we hate to use, because at the end of the day, what you need to do to recruit great reps if you're at 10,000 a month versus when you're at a million a month is very different, right? And that can be something as simple as just changing the compensation. So what we've always done in the

beginning when we're launching a new offer before we have, you know, a lot of track record within our offer or history within the offer is we'll offer higher commissions, right? And not only in the beginning, but we'll set up alignments and incentives. You know, you'll see right here we have a spiff program that literally adds an additional 40 to sometimes even 80% on top of their commission. Now that might seem like a crazy map, but so when you start pairing that you know, with Max and with Midas and all the other ways to optimize your business, you're gonna start seeing that it is well worth it to pay incredibly high level talent.

Because what that does, if you're gonna be one of the highest paying people within your industry, you're gonna be able to retain the top people that are actually bought in, or they're not gonna be looking to jump ship just because you know they're making 15 K with you, even though the offer's great, if they have an opportunity to go make 25 or 30 K somewhere else, at the end of the day, right? We're running a business, the numbers need to make sense. So as a business ramping up, right? Don't feel like you need to stick to the industry standard at 10%. What we personally do is a 10% plus spiffs, right? Let's say they get 10% as a closer, and we'll have unit bonuses. So they get, you know, 10 units in a week, they'll get an extra, you know, couple thousand bucks. If they get you know, 15 units in a week, they'll get an extra 3000 bucks.

If they get 20 units in a week, they'll an extra 5,000, you know, \$5,000. And so when you start looking at, you know, simply if you do a \$10,000 offer and they're getting, you know, 20 units in the door, that's \$200,000 of capital in your business that's helping you grow and helping you move forward. Now, what it looks like from a commission perspective is 20 k, but if you have an extra five or 10 K bonus in there, you're still making an insane profit margin while being able to provide the opportunity to only incentivize people when they hit certain metrics, which then is going to drive your business forward and drive your team forward and drive your culture forward, right? I'm sure you've seen throughout this video, or not throughout this video, but throughout onboarding process throughout the pre-call video that we have set, you know, closers and setters on the team that make just absolutely outlandish commissions.

And that's, you know, it's not like we're breaking the bank by paying them that we're grateful to pay them that, because that's the impact. It's directly tied to the impact and the incentives are aligned to make sure that when they impact the business at a high level, they get rewarded at an incredibly high level. So from there, that's essentially what you're gonna be looking for and how to get it, how to cultivate it. And then the next thing you're gonna be like, you know, you could be asking is, well, where do I find this talent, right? How do I actually find talent that's going to be a good fit for my business and how do I get them to apply? So the number one tool that we use outside of referrals, and this is what we're gonna dive into first, that's gonna be most important for any, you know, small size business.

If you don't have a ton of relationships or connections in the industry, Facebook groups are gonna be a great way to do it. I personally, even with all of our relationships, even with all of our connections, even with the referrals we have set up, I love going into Facebook groups, right? Like, if you have a fitness offer, go into Fit Pro groups, right? Go into fitness trainer groups because a fitness trainer might be making, you know, 10, 12 grand a month, but if you have the opportunity to offer them, you know, 35 grand, 40 grand a month commission, and they have insane levels of expertise, and all you need to do is actually teach 'em how to pitch that they already know how to pitch fitness, right? They already know how to, you know, walk clients through the entire process. The only thing they need to learn is your specific process, your specific business, and also there's probably gonna be a layer of value add where they can actually add value to your business based on their experience and based on their track record, right? So go through, you know, search a any group that's applicable to your business, right? If it's high ticket, if you're just looking for a high ticket closure, in general, if you're running an agency, go into high, high ticket fitness groups, right? At this point in, you know, this day and age, there's literally hundreds of high ticket fitness groups, depending on where you live in the world, depending on what you're looking for specifically, you, I mean, you can post looking for a specific track record a year or 2, 3, 4, 5 years of track record, et cetera, and you can continue to move forward with that, with that applicant knowing that they

have a track record. You can pretty much find this in any sort of group. Don't just limit it to like high ticket closers or high ticket setters because you're gonna be able to find amazing talent in other groups that are super specific to your industry.

And let's dive into how we actually go about that. Number one, you're going to want to join a group. And at from the start, if you can't get a post approved, it's super easy to just reach out to the author or the admin of the group, say, Hey, I'm looking to provide an incredible opportunity. Here's what I'm looking to do. Here's my company, here's what we do. Here's how we impact people. I would love the opportunity to add value to your group by being able to post a job opportunity that's going to align with the people in your group and potentially provide amazing value to a couple five, 10 people. And even if you're looking to hire one person, right? Hire that one person from that group and that community, that's a value add to the author or the admin of that group. So here's an example of what will actually post.

So this was a the Athena Fitness offer that we have running within the portfolio. And it was very simple, right? It wasn't too wordy, it wasn't incredibly long. It's something that someone's gonna be able to see. You're gonna wanna catch them right after that, right? Wanna join a hundred million dollar team? We have another one that doesn't actually include that. So if you're not, you know, if you don't have a hundred million dollar portfolio, that's totally fine. You can still recruit incredible talent. Our catch for this one post was wanna join a hundred million team, right? High ticket A players. You do not want B players and C players, you're obviously gonna get those people that are going to apply, but just by stating, I want a, an A player on my team, it becomes incredibly easy when people apply. And you can identify those A players after that once you get into the interview process, right?

We have an insane high ticket B2C offer within women's fitness, currently scaling the 10 million a month, we've scaled our previous offer to 8 million a month, and now we are repeating the process again, hiring inbound and outbound, right? Inbound essentially is going to be your closed team. You're gonna be having, obviously inbound needs going through your funnel, and then outbound dialers set that are gonna be calling opt-ins that are coming into your funnel as well. Simple thing, right? Like anyone experienced in the industry is going to be able to see, okay, cool, seven extra ads, which means they're not having ad fatigue, they're not struggling on their ads, and you could be getting substantially higher than that, especially after you've worked through the process and you've got your ads dialed in. High quality lead flow, currently scaling the sales floor set of positions making eight to 10 K per month, which is great because you're gonna be able to get closers that are making, you know, maybe they're an offer that's fatiguing right now, and you're gonna be able to get closers, which is essentially what we always do is we have closers, high level talent start in the set position.

Number one, if they are a, if they're able to start in a set position, it means that they don't have an ego. It means that they're willing to actually work for the long-term vision. Plus, if they're making, you know, on an offer that's fatiguing, if they've had a couple bad months, they're making you a 4, 5, 6 K a month, the opportunity to come and make eight to 10 K ripping dolls all day and adding an insane amount of value to your business is gonna be super appealing. And I can tell this from firsthand hand experience. We've literally hired dozens and dozens and dozens of closers into the set of role. Some people are like, oh, that's not possible. CL high, high ticket closures won't wanna take a set of role. That's just not true. They'll take it, especially if it's, you know, if you have a trajectory of like, Hey, rip this for four weeks.

Make sure that we know how to fully optimize the leads that are coming in the door. We'll obviously incentivize you and you can, you know, have an an incentive structure that makes sense for them, and then give 'em a, give 'em a runway, give 'em a track record, or not track record, but give them a a roadmap to actually move up into that closer roll. And you'll find that the vast majority, I'd say nine times outta 10, they'll say they are willing to start and set a role if it means they can get into a closer position. So it means back to the posterior closures making 20, 25 K per month, that's on the low end, essentially. I, I tend to lean away from posting if, you know, even if we have closures on the floor making 80 to a hundred K a month, it just seems so unrealistic from 99% of people's standards that you'll probably get people that are like, oh, this isn't true.

Or, you know, oh, they're BSing me. Or maybe that was their, to that one top closer, but I can conservatively say 20 to 25 K per month. And it's super easy, it's very appealing. You, it's a quarter million to \$300,000 a year, which is, you know, great money for high ticket closer. And then also you can dial back in if they say, well, is that your top closer? It's like, no, that's, you know, that's our average, that's our average person, right? And one thing to be mindful of here too, if you're not in a position where you have closures making 20 to 20, 25 K a month, that is fine, right? The whole goal is to find high level talented people. And even if you're projecting income, you can say who are projected to make 20 to 25 K per month, right? And you can hop on the phone and you can walk somebody through logically how you are part of the air system, how your leads are gonna be coming in what the funnel looks like, what you expect conversions to look like, what the set process looks like, like having that confidence and clarity as a business owner, which you're 100% going to have if you don't have it now, and you're, you're 100% going to have it as you go, as you continue to work with air have the ability to say that and explain that from a very logical, highly convicted level.

People will be bought in. And I can say this again from experience back when, you know, there was five people at Apex and you know, we literally were just starting up one of the offers, you know, a few years back. We didn't have people that were making, you know, 15, 20, 25 grand a month. And so we literally brought in a group of three people, and those three people were literally just sold on the vision of, Hey, you'll be able to make 10 to 15 grand a month, right? It wasn't even 20, 25, 30, it was 10 to 15 grand a month. We pitched them very hard on our core values, very hard on the vision that we wanted to accomplish. And that, at the end of the day, got us the ability to work with some incredibly talented people, which then helped us scale the portfolio.

And obviously, you know, at the end of the day, we are, we're at where we're at now. So this is just, you know, an outline looking at what the post should look like. Again, talk about your, you know, results rate. That's one big thing too. When you're hopping on the phone, results, rate's gonna be amazing. You know, your fulfillment should be so dialed in that, that, that you should not have any pushback, right? You're gonna get a lot of people to say, well, you know, the why are you leave? Why are you leaving your current offer? And they're gonna say something like, well, you know, at, you know, ads fatiguing, I'm not getting that many calls booked in my calendar. It's super hard to sell the offer, or the worst thing, which is consistently what we hear when we hop on with hot data closers.

You know, I came in crushing my first month you know, made 30 k and then, you know, three months down the road, I started realizing that the fulfillment was absolutely terrible. And they're starting to have, you know, clients text them saying, Hey, you know, so-and-so on, fulfillment's been ghosting me. Or, you know, Hey, this actually isn't working the way that I thought it would. What's going on? Hey, can I get a refund? And it's like, that's something you'd never wanna expose your your closing team too, by having amazing fulfillment. Obviously if you're part partnered with air, it means you care about your business. It means you're very, you know, locked in. You're dialed in on making the impact that you wanna make in this world. And last part here, right? This, we're not, you're not looking for, you know, snake, snake oil salesman, right?

You're not looking for say, anything to get the sale. You're not looking for people that are, you know, manipulative and can essentially do fear-based selling. That's not what you're looking for here. You know, essentially simple, right? Common interested you know, co comment, get fit, you know, just having, having something in there that they can comment on it to know to let you know that they're interested in, in what they're doing, right? So this is a screenshot of what it looked like. You know, within five days we had 54 comments. Some of those were response responses to comments. And essentially like this, I think this one post ended up cultivating probably somewhere between like 12 and 15 total applicants, right? And for a sales team that's scaling and, you know, has hundreds of reps, 12 to 15 might not seem like that much, but I mean, if you're literally looking at, you know, if you, if you're at a hundred k a month or a million dollars a month, you're like, I need a couple great people.

Being able to cultivate 12 applications off of one post is incredibly valuable and incredibly helpful. So I'm not gonna go as in depth with the second post. Essentially, the second post was without the a hundred million team. So it's, it's almost the exact same thing. High ticket A players, we've got a B2C offer, literally the exact same thing, right? Comment below and all DM you next steps. So you might be asking, okay, well then once they comment, what do I do? How does it work? And that's what we're gonna go into, right? The bonus section actually cultivating applications. Now, if you have three or four or five posts up in different high ticket groups, you're gonna have a ton of people hitting interested saying they want more information, et cetera. And this is literally a step-by-step s o p that we have our VAs go through and actually comment.

So we'll, you know, just give them access to, you know, my Facebook or someone's Facebook that made the post. I would be Thomas myself. And they'll just, they'll just go through, right? If someone's reached out and they've said, you know, they're interested in the offer, just like it, comment it, reply information sent, click on their profile, at least literally step by step. If you're on Facebook, you can literally visualize yourself doing this, right? Like the, like the post sal, you have a track, right? You have a track marked of what you've done, comment, you know, information sent, click on their profile, click the message button. And we even included a template below, right? Of exactly what we send them. We're building out an incredibly talented team. So the more we get to know you prior to the call, the easier it's for us to find people who are looking for looking at this as a long-term home, not just another offer to make commission.

The next step is submitting your application here so we can get a little bit of background before we schedule a call. And literally we send in the type form link. This is super easy. You can have your type forms integrated into your crm. You know, let's say you have go high level. You can literally create a pipeline in there that says, you know, recruitment or new hires or whatever you wanna call it. We just call it recruitment. And we have every form that comes in just goes into that pipeline. Now, if you don't wanna have the integration, or you're like, all right, I just need a couple applications, I don't wanna worry about large scale, you know, recruitment, just go into the type form. When you see people apply have an email that gets sent from Typeform to your email address.

So that way when a new new one comes through, you don't have to go into type form, you can just click in your email, click on the type form, read through it. I think our type form is something like 24, 25 questions. Twofold. You might think, well, that seems incredibly long, or, that's a lot of information to get, like the high, high, high level people aren't gonna fill this out. If you've provided 'em enough information beforehand and there's enough interest, a bunch of people are going to fill this out. Like, I can guarantee you that people will go through, and also you'll have much more to talk about on the call specifics. And what we found too is that as you go through this, there's key questions we have in there about culture. You know, gimme your best exp you know, experience within if, if, let's say they're in within fitness, right? Cause we did a fitness post if they're within fitness, say, what's been been your best experience working with somebody in the fitness space, right? And you can learn an insane amount about people and their heart and their integrity by literally just how they explain what that interaction with the client looked like, right? Someone that just leaves you know, a couple sentences that says, you know, something like, you know, yeah. Like, I helped somebody lose, you know, 25 pounds and they messaged me how happy they were and they were super pumped about their before and after pictures. Versus someone that leaves like two paragraphs at breaking down, like how heartfelt it was to have this interaction and be able to build this connection. Like, that's the person you wanna go with, right? Cause that's the person who actually cares enough about every single person they've worked with to not only make an impact on somebody, but that's the type of person you want within your organization to make that high level impact within your team and with your clients and within your customer base.

So from there, some stuff just said, you can link it out, go through zpi. This will be send out after we look, look through it, right? If you don't wanna have everything fully integrated, it's super easy to go through and say, you know, if you look at your email, it's, it's somebody that you want to interview. Just say, you

know, Hey Jason, or hey Alyssa, got a chance to look through your application and would love to book a call. And then just insert your calendar link and drop that, right? And say, Hey, you know, book a call. You can need to say something, you know, like an assumptive sale, right? Hey, send me a text message after you've booked a call. Obviously this is a very high intent process. People that have already commented interested, that have already follow out the type form, they have commitment, consistency, bias, right? So they're going to want to follow through with the process. You shouldn't have to chase people down with this. You have a high conversion rate, and honestly, if you have to chase people down, it probably means that they're not a good fit for you anyways. And they're probably not gonna make that good of a sales rep within your organization. So next step here, we'll get sometimes too, especially people that are, you know, highly or have a long tracker, tracker within, within the industry you know, if they ask for more information, if it's like, Hey, yeah, happy to submit the Typeform, can you gimme a little bit more information about your offer? Awesome. Totally. You know, Hey Jason, hey Alyssa, it's a 9,800 offer. It's 10% commissions for all closers, 8% for all setters. I always, even if I'm expecting to bring them on as a closer, which 99% of the time they're gonna start as a setter anyways, I'll always say commissions for both, because I want them to know that number one, if that is, is the spread here? 8% is not that much different than 10%. But also it just shows like there's transparency throughout the communication, right? We're not hiding anything. We're not saying, okay, here's set our commission and then you have to break down close commission later on. Just be super transparent and be open with everything you do, right? And again, this isn't like a, you know, a five page thing. If you have a website that breaks down your offer or like a sales page that breaks down your offer, you can always send it over to them as well. But this is literally what I send people specifically, right? I don't send 'em to the sales page. I don't send them the, the website. If they ask for a website, I'll send it. But I just do something super simple, right? The program includes a one-to-one coaching three day, three, three daily accountability check-ins is a 12 month program.

So 21 day mindset, psychology, mastery you know, looking forward to seeing your outpatient come through and taking next steps, right? That information, I'd say nine times outta 10, if someone wants more information, that is plenty sufficient because they essentially are looking for more information on the offer. Because the original post just talks more about, you know, what we're looking for the company that it's a fitness offer and what we're kind of trying to accomplish, it's not really offer specific. So that process right there, just to give you an example, we went all out on recruitment. And this was pretty recently. This was probably like about a month ago. And our goal was to get a hundred applications within 72 hour period. Now, obviously it sounds crazy and sounds super outlandish, but through high volume you'll end up getting incredibly talented people.

It doesn't mean you have to do a little bit more legwork and you have to filter through applications. That's totally fine. What we got through connecting with just a couple people that run those sales groups, incentivizing them, which we'll talk about later on with, you know, a referral bonus. The amount we had, like 372 applications come through within like a five day period. So we completely blew it outta the water. We ended up bringing on over 40 people, but it's like through 372 applications, we brought on less than 10% of the people. And you can imagine the level of talent that we gotta interview that we gotta talk to. We did over a hundred and I think 150 interviews over the course of one week between myself and somebody else that was on the team recruiting. And we ended up pulling amazing people, right? And the beautiful part about that is as we started interviewing people, like let's say you're looking for two setters, it's like, as we started interviewing incredibly top level closers that were willing to come on as a setter or specifically setters that are like, you know, yeah, I've done setting for six months. You know, my average, you know, monthly cash collected is \$250,000. It's, it's really easy to just ask the question. Great. Who do you know that, who, like, who else do you set with? Is that, is that a team of people? Are you just a solo, you know, solo one man mission on this offer? Most likely they're pushing that level of revenue number one. They're gonna have some sort of insight about processes scale. And I don't mean like for them to take that and teach you. Cause obviously everything is within air that you need to know.

But I mean more so like, they understand what it means to operate at that level, right? And the expectation when you're doing that level of revenue and the expectation when you're providing that much value to clients is so much higher, right? So that's going to ripple over into your business. Cause you're gonna have somebody that comes on, they already know what it looks like to, to convert a high amount of leads into sales at the end of the day. And I think we ended up pulling like an additional three people just from referrals from, you know, high level people that have high level networks that were like, yeah, you know, I'd love to not only join the team, given the opportunity, but also, you know, I've got my buddy, you know, James, that is, you know, works with me on the offer, hand in hand.

We've been working together for, you know, the last six months. Yeah, absolutely crushed it. It could be a great culture fit. And he's looking for another opportunity. So, you know, with all that being said, there's a lot of ways to go about getting talent. And this is gonna be one of the most fun parts of your business. So especially when you see these processes and these simple systems start working and starts to get it really exciting. I mean, even, even, you know, with us and, and all the, you know, everything we've accomplished in the business that we've built, it's still unbelievably exciting to see 50 new human beings or a hundred new human beings, or in our case, they're 372 human beings. Be like, I'm interested in an opportunity that ideally is going to change my life, right? By working on your team, by being invested in your culture and by essentially adding value to your community.

So with that being said, the next layer of this, which is how we get about 60% of our current team is going to be, like I had mentioned, it's gonna be referrals, right? So once you're building your initial team, referrals are the number one way to recruit people. Because high level people, I said this earlier, high level people know, high level people, right? If someone's been closing in the high ticket space for 10 years, there's a good chance they've gone through an insane amount of trainings. There's a chance that they've worked on, you know, more than a handful of teams, and they have the ability to pull into their networks, pull into their resources, and get another high level individual onto your team that's already trusted. You know, their track record. Ideally you can interview them as well and understand what their trajectory would look like and if they're a good fit within your team and you can continue to stack talent onto your team.

So this is a simple process. I'm not gonna go through the whole thing, it's just, it's just really easy, right? Really simple process, which you can see on the document. It's like text intro. Have the person that is making the referral do a text intro. We obviously send them the you know, the form to fill out through type form. And then we get everybody introed. And then we go through the, the exact same process that anyone else is gonna go through which we cover, which Terry is an incredible job covering from journey application all the way to new hire in the next module here. So one thing, last thing I wanna touch on here, talent in your business is the most valuable aspect of it. I think Caleb touches on this in the pre-call video. The amount of money that someone would've to pay us to buy our team doesn't exist, right? Because we've spent like months and months and months and years and years and years cultivating these processes. We've spent years and years and years identifying what the actual core values that we have within the organization look like. We've spent years and years and years understanding what the right fit looks like and what the type, what type of people are gonna actually mesh within our team in order to accomplish the incredible things we wanna accomplish, right? That's gonna be the same thing for you when you're looking at this. Don't hesitate to offer somebody an outlandish referral bonus. Cause if you put it into simple numbers, if you're selling a 10 K offer and you have one rep, you have one setter, let's say you have two setters and you have one closer, and you can bring on a couple more setters that are just referral ref super referred over and one closes it referred over, and you can double your team size and ideally double your revenue.

Those three people are going to be worth hundreds of thousands of dollars to your business, even if your average set is doing 50 or a hundred k cash collected a month, right? Two new setters is \$200,000 in additional cash collected per month. And again, if you're not at that level, that's totally fine. You will get to that level. These processes are bulletproof. They're sure fire, we've literally tested them and refined them

again, again and again. So to summarize all that, give people an insane referral bonus if they bring somebody into your organization. And obviously paired with that. Don't just hand out money, you know, freely and be willy-nilly about it. Have some sort of a structure in place. So for example, for us, any referral that gets sent over to the team, we will pay them somewhere between 520 \$500. Now, if you're just starting out and you're like, man, a high level closer is worth a hundred thousand, 200,000, \$300,000 to my business, pay somebody that refers that person over 5k, like at the end of the day, it doesn't matter. And you're gonna set up a stipulation. It's not like, Hey, make a text intro. I hire them, I give you 5k, right? Set it up where there's a 30 day trial period, they're gonna come in and within the 30 days, number one, if they're a good culture fit, number two, if they're actually hitting their metrics. And then number three, if they're massively bought in and they're really a component, you see long-term, that's when you're going to give out a referral bonus, right? So for us, for example, we have anyone that's on the team for more than 30 days and is actually hitting KPIs. And again, if they're not hitting KPIs, we're gonna let them go within, within those first 30 days anyways. If they're not a good culture fit, we are definitely gonna let them go before that 30 period. So don't feel like you are putting yourself at risk by offering a referral bonus. This is again, how we've cultivated some incredible, incredible talent and some amazing referrals. And as you scale your business let's say you're not as at, at as much of a need for talent, drop that down, right? Just cause you set something in stone one time or set something in place doesn't mean it's set in stone, right? We have, you know, \$2,500 on one of our offers. We have \$500 on another one of our offers. At the end of the day, the \$500 offer, or the 500 peripheral is because the team is, is, you know, stacked, the team is scaled out. We have an insane amount of people in the queue. And even though we have people in the queue, and even though we have applications we could reach back out to, that'd be good fits. I will take your referral seven days out of the week of somebody that can give me background context. If they've worked with 'em before, they can tell me about their life, their family, their history, their integrity, their passion. Like that's a person that I'm gonna, I'm going to one spend my time with and allocate a slot on my calendar to set up an interview. So that being said, guys, use this information. I will be 100% at your resource or at your disposal. So will Terry. You know, as we continue to build this out and have the team expand, you'll have an unbelievable amount of people from the leadership team all the way down that can help you with any part of this process. So again, reach out to myself, reach out to Terry if you have any questions on this process, if you want more details, if you want access to documents even something as simple as like, Hey, I had an incredible interview. I offered them the position and then they just got, they got offered another position, they had another interview. The next day they got offered another position. What can I do differently in my pitch, in my presentation, in my copy, in my process? What can I do differently to make sure that I start landing those high level talent and high level recruitment that you need to in order, in order to scale your business and move things forward? So that being say, guys, I'm incredibly grateful that you had, you had the opportunity to spend the time watching this video, and Terry will see you in the next video, which is the journey from application to new hire.

The Journey: Applicant To New Hire

All right. All right. All right. Hello everyone. Hello, you. Beautiful bebo. What we have here, and what I'm gonna be taking you through right now is as we can see the journey of applicants to new hire. So this is a document you have full access to through all of its evolution and years and years that have gone into this beautiful document that we have presented before you guys. So very simply, what I'm gonna do, I think

the best way to go about this is go through the documents, and I'll be reading it to you and giving you some examples, and then also clicking into some of these examples here so you can really see. But again, you have full access to all of this, and you can always reach out for any help. So, let's dig in, shall we, the journey of applicant to new hire, what're gonna be what we are going to be covering in this section.

So, the journey of an applicant to a new hire, you obviously want to give them a world class second to none incredible experience from the first point of contact through interviews and onboarding to starting on the team, every single part of the process or process, as you guys say, wait, you guys say process or process. I keep saying this on these videos, I should start, but every single part of the process should feel incredible. You know, there should be no, there should be no gaps. There should be no what did I say on the other video? A, a lapse in dissipate or, or, or a, a, a lapse in hot cognition. Hot cognition should never dissipate through this incredible onboarding and hiring process that you guys have put together that we've helped you with. So they are joining an elite organization.

Think of it again as the Navy Seals or an elite black black ops units. And remember, the purpose of hiring is not to just find someone with a great track record. It's essentially to pitch them on joining your family and aligning in the accomplishment of your long-term mission. Now, objectively, some people may look at that as, as dare I say, even a little cheesy, but it, it couldn't be further from the truth of it being cheesy. What I mean by that is we've gotten to where we are through the portfolio in multiple companies we've had and had success with by living and breathing what our mission is and what are our core foundations and core principles and core values are, you have to be it. In order to have a truly successful organization, you have to have people's buy-in to a very high degree.

So it really is joining a family. You know, I, I consider everyone within this portfolio part of the family, you know, and it's very easy to see the culture fits versus the not culture fits. Although you, it will be hard push to find the non culture fits within our portfolio, because there really aren't any. So anyway, you'll be spending day. This is an elaboration of the point. Of course, you'll be spending days and months and hopefully years with this person. Approach it from that framework. And I could not say that more authentically or genuinely, if I tried it, is of the utmost paramount importance, excuse me. So if you wouldn't spend a good, a good kind of mental framework for this is if you wouldn't spend three days with them camping, don't hire them at all. If you can't see yourself spending hours going deep with them on their position and how that impacts the overall mission, and in general, just having quality conversations with them, don't hire them.

So step one in the process is our type form. And I'm not gonna, oh, excuse me. You might hear my my little baby crying in the background, but I, I, hopefully my wife will also hear that and jump in for the rescue. So here is an example of our type form for one of the offers. We, or one of the businesses we have, which is Athena which is now chain. Oh, again, apologies babies p crying in the background. Maybe you can't even hear it with with the headphones here. So this is Athena by Queen Body. So this is our, our little blurb to start with. We are assembling a fully committed and highly talented five star sales team. Anyway, don't need to read through it, but you can see you can absolutely copy this, this template we have, and then it gets into all of the different questions, name, last name, so on and so forth.

Again, don't need to go through all of this just as an example. So you can see this is a live document that has real time templates for you to go through. So step two, interview flow calendar, booking link. Set up a calendar in jhl which is go high level Calendly, or your preference of booking software and crm. So here's a note, include your zoom link in the booking information. If you want to do video interviews, I highly suggest video interviews because what do they say this, I, I'm, I'm, don't quote me on this, but it's something like, 90% of communication is nonverbal, right? So very important to see people's faces, how they're reacting. And it's just a far better indicator of, of, or, or you are able to get a better indicator and better read on people if you can see them and have a genuine face-to-face conversation.

So, another great thing that we we do here that I've personally had a lot of success with is the film and send them your core values video after they book, or have it added into the calendar link, and send them

an email to watch the video prior to talking. So what do I mean by that? Maybe let's actually take a little look here. Now, I will preface this by saying this, I believe is, yeah, almost 13 minutes long. I'm a, I'm a firm believer in this has worked fantastically for us that the more in depth you go the, the more of the vision people can incorporate into, into, or, or, or let's say the, the, the longer it is, I, I find if it's done well, the more buy-in people have. There's a strong correlation, correla correlation between those two things. So let's play a little bit of it here. So I'll just give you a little breakdown. Hopefully we'll be able to hear. Yeah. So obviously when I <laugh> the substantial bid and didn't real, I forgot about that. But then it's basically a video getting into the core values and principles. We can listen to a little bit of it here, obviously don't have to listen to the full 13 minutes.

So again, we'll just skip across here in little parts.

Boom. We'll end on that one. That was very random that I've managed to skip to that exact part of the the excellent Charles Darwin quote there. It is not the strongest of the species that survives not most intelligent, but those most responsive to change a k a evolution baby. So, let's let's go back to the document. And again, the reason I showcase that is I strongly suggest doing a a pre-call or pre-interview video like that, that you send to applicants, because it, it just gives them such a great example of what your core values are and what you, what you stand for as an organization. So then we move on to the interview, and I believe we have here a full interview script that obviously stating your company's purpose and the purpose of the interview. And you can reframe maybe we'll actually evolve this script a little bit to put a, put some word tracks in there to open up the conversation.

But in all reality, it is a interview question script in, and you don't need to go into de deep details on the word tracks for an interview that you are interviewing for. This is not a sales script. Well, I guess you could argue it is a sales script of sorts because you're selling them on your fantastic organization. So what I have done here is when I put this document together, I have put all the questions you could possibly ask, well, not all the questions you could possibly ask but a lot of great questions in here with a breakdown of exactly why you want to ask these questions. So, for example, why you're looking for a new role, you are looking for a positive forward thinking attitude. You want to see that they have a growth mount mindset and will tackle the new role with energy and enthusiasm.

So here are the questions with the little dash there, and then the breakdowns below. Again, all of this stuff is constantly gonna be evolving and being added to. So you'll always have the most up to date and current information at your disposal as long as you have access to this glorious document here. And and then I, we've also included a script that you can absolutely make your own. This is the five core values that I was talking about in the video I just showed you. So feel free to take this and make it your own.

Obviously going into all of our core values, standards, knowledge sharing, truth and energy, and a breakdown of all of that. And again, feel free to take this and adapt it to however you want to be perceived. But I will tell you one thing, this works very, very well teach them how to overcome objections. So we, we are going to include a new document in overcoming objections, but I'm gonna be radically transparent with you right now because I looked at this just before I recorded this. And I will tell you that we very, very rarely get objections. And the reason being is our funnel, our hiring and recruiting funnel is so great and solid that anyone that comes through always ends up selling themselves to us. And it's, I, I honestly don't believe I've ever had any objections come up because of the experience they have by the time they get on the phone with myself. However, I will stay and, and if, if objections do come up not again, that we've, we've had many ever, and that is radical transparency for you. You just have to approach it from a truth-based perspective obviously no white lies to try and get them.

And, and not saying anyone would do that, but people have done that in the past. White lies to, you know, tell people how great their organization is. And then if you do do that or bend the truth, let's say, to get people in and what they are, the, their, their expectations are not met or there was over-promising and under-delivering, then obviously that's, that's not gonna work too well <laugh>. And and more than likely they won't be with you for much longer. So just app approach everything from truth-based and just just have an incredible funnel leading up to that. However, like I said, I will put in an overcoming objections.

But I believe what I just said is, is better than anything you could <laugh> put in a document to overcome objections on an interview process or, or meeting.

Use this script to elaborate on, oh, we've already been through that decision making. We'd like to hire on the call if we know they're a rockstar A players. However, if you talk to a business partner, if you need to talk to a business partner before hiring, feel free to end the call by mentioning you need to run the conversation by your partner, annual reach back out with next steps onboarding. Now, I will make, I'm not gonna dive into all of this right now. I will quickly jump in here and show that this is pretty extensive. We have a really solid onboarding process here. So I will do a separate video on this. We do go into a, a little bit on the document we were just on, but as, as, as you can see here, this goes in depth.

This is everything we do to onboard a person effectively, efficiently. And so when they start their role, they are fully, fully not only bought in, but they're fully aware of everything they need to do, all of the resources they need to be a part of. What I mean by that is the different platforms, all the different trainings we use train to help with video content and all the documents that they need to access. So we'll do a separate video on that one. And then obviously we've got the offer letter. Break down the key expectations within their position. Make sure it's clear what they're coming on for and expected to be doing. Both parties need to sign the offer and letter of intent and once signed store in your Google Drive or employee folder, right? Make sure that everything stays where it should.

And you're not just saving everything in public files. So let's quickly run through the onboarding schedule here, or schedule again, one of those words that I get confused with the English and American side I think you guys say schedule, so we'll go with that. So is just exactly what we do to onboard our people over a five day period, I believe we've got five days here. Yep. Over a five day period. So I will quickly run through this just because I really want you guys to understand the context and how important this is. I've seen companies try to onboard people in one day, in two days or three days. There are massive holes in doing that. There may be a way to do that. I've never heard or seen it done effectively. So let's, let's run through this and I'll show you what I mean.

So, day one morning call. So it's a tech setup call. That's where you do your company email. We use Gmail. You obviously create an invite. Send their login to the company, email to their personal email. You know what I think we'll be wasting time to literally read verbatim everything that's on this. But I do want you to, let's touch on the main points here. As I mentioned, training all here training invite, even whether they're set closer finishes or whatever other position you are hiring for. It will be a relatively similar system to get them onboarded. So you obviously have to onboard them to this crm. We use Slack. We highly suggest Slack. It's an excellent communication tool for businesses. I'm sure you've all heard of it. If not, definitely look it up. It's a good one. I, I've used WhatsApp before in the past as well, but slack seems to be the one on top and always wins Gusto.

Very important part. You want to give them homework for the day, every single day. So, for instance, reviewing scripts, listening to calls reviewing standard operating procedures, SOPs, going through crm training and best practices in Slack. Let them know role play will happen on day three or four, depending on the speed of onboarding and length of training. And then in the evening calls. So we're doing two calls a day here. Now, you can do individual one-on-one calls or group calls as long as they're effective. And and, and you are, you are following these steps. It is one of the most effective ways to get someone onboarded. Anyway, moving on swiftly here. Day two, morning call, answer questions from training modules completed. Talk about company culture and ensure note taking and hunger as a key fundamental of success. You want the hungriest people, or are the most bought into the vision and growth to be rewarded.

So look out for those rock stars, those A players that are going above and beyond, especially during this onboarding process. And whoever's running the onboarding process, make sure that they have a key eye for realizing the people who are the hungriest and seem to be the most productive, let's say, for lack of a better word, then <laugh>. So day three morning call. Again, answer questions from them. This is all following a, a structure as I'm sure you're seeing now, ensure they're listening to prior successful calls.

Again, this is all pretty standard stuff. You, you guys have this exact blueprint, so you can go through it. Review again, day four review. Necessary, necessary documentation and tools. The script master, so P doc all this other good stuff. Then we get into crm, set up how to set up the calendar.

Then you give them a live tour of Slack and the different groups that they're gonna be a part of. And obviously you've got a breakdown here, ended with a q and a and then an evening call to review things that were learned during the role plays from that day in previous days. And then finally, day five start with the morning call again, call reviews and review assignments. And then the final q and a in the evening with more questions and tour of Slack train, CRM, and all the other good stuff that you guys are getting. Alright, I don't need to let this video go anymore. Hope that was useful for you guys, and I will see you on the next video. Please feel free to reach out to me if you need anything at all. Let's rock and roll.

Offboarding

Hello, once again, everyone, this is a super quick video on offboarding. Just as important as onboarding. You need to, even though not as extensive obviously, but you need to have an extremely well thought out and well-planned off boarding process. Apologies, by the way, it's a bit echoy. I'm in a, I'm in a, if you've ever seen and command a glass case of emotion, it's just bouncing off the sound, bouncing off the glass here. Anyway, good, good. And command quite there. Off process, make sure that it is seamless. Obviously, you need to do things. It's incredibly important that you offboard people in the right way, that you get them off all of the relevant platforms, especially if you are using things like Slack where they have communi direct communication and instantaneous connection and communication with everyone else in the organization. So you never want someone that's disgruntled after having been let go for whatever reason, to then start blowing up chats in Slack and using not so nice language occasionally to do so. So one thing. So let's just quickly go through this. Don't wanna make this overly long or longer than it has to be. So you should always plan ahead of who you are letting go. Offboarding starts once an email is sent to hr, and this is our personal hr email right here with names and termination dates for em employees to be offboarded properly. So again, you, this is just a good example. This is exactly what we do, but first you want to subtask with each assigned to a different person if needed. So make sure that the right people on your team are handling this. Don't just be like, oh, we let go of this person and, you know, it's just a bit of an, I'm gonna refrain from swearing there, but an s show, <laugh> and there's just a very formalized process. So number one, initiation process through hr, email number two, removed from Slack, email, other apps. Obviously make sure the contract DocuSign you have access to and is filed away appropriately. Obviously all the financial apps and platforms, we use Gusto for a lot of our HR stuff. I'm sure a lot of you guys have heard of that rippling as well. Again, making sure they don't have access to email. You can, whether you are doing it over phone or over the email. So

The only, only reason you would ever really want to let someone go through email, obviously it should always be a call, especially if they're active team members and are on field every day. Now, I've done both versions of these extensively on the phone, or if they have not been on field for a decided amount of time, whether it be a week or two weeks, whatever you state in the initial agreement. So obviously a lot of our, to give you an example, a lot of our sales team are remote. In fact, most of our sales team for our different offers are remote. So if people just don't show up and don't, this happens occasionally and for whatever reason, they don't overcommunicate again, one of our fundamental pillars and foundations of

what we do is radical transparency and overcommunication at all times. If people do not adhere to that for a given amount of time, again, whatever is stated in the contract and there's been no communication and there's been no activity for them let's say it's, I, I'll just use a an example to not not misled in any way, but let's say they haven't been on field for two weeks, then a very short and concise email will suffice saying, we have not seen any activity from your end and no communication the last two weeks.

We have therefore deactivated your account and will not be moving forward with you. Best of luck on your journey et cetera, et cetera. Just needs to be short and concise. You don't need to give too many other reasons apart from they haven't shown up. And no organization in the world can function effectively if people just think they can do that. So does require some discipline and strictness to, to do that. And again, it should always be established. I cannot stress overcommunication and radical transparency enough. It's we do our daily meetings every day, which I lead. And the, again, foundation overcommunication radical transparency. If it's worth repeating, it's worth remembering. So and then again, just following these very simple structures or or format here. Obviously notifying the team leads or whoever their direct reports are, the personal I'm letting go of or we are letting go of, right?

So whoever they directly report to and whoever else needs to know, so on a need to know basis, you don't have to officially announce every person you let go to the entire team and obviously taking away all their other access, for instance, like train you and then make sure this, so this is actually a great one to end with and ending this video, the roster. Make sure you have a really badass roster that is live and make sure that people, and you have someone on that that is updating it live. I can't tell you how many times, especially when we started up the portfolio, that we didn't have a good live roster in place and we were always, because we were hiring so much, it became a little confusing as to who's still here, who's not, and we just didn't have an effective system. Now our system is seamless, it is live, go to on onto our roster at any time and know ex who exactly is on field, who has been let go over the, the history of the organization. So definitely keep that in mind. Very, very important. Let me just see here if I'm missing anything. A thing.

Just, just one thing. Obviously you want to be, and this is, this is, this should always fall on on hr, but also when letting go of people, you also want to do it in the right way with the right frame. Something I like to do, this is more on, on a personal note in mind. I always like to lead with warmth and lead with encouragement. Tell them that they had done some great work if that is necessary. Or, or true, but also give them hope. One thing, one thing I like to do is say they can always reach out to me again if this is, if this is truth, I always like to make sure that they've got my personal phone number and they can always reach out to me and I'm happy to give referrals or recommendations if you genuinely are happy to do that, right? So it's just a middle note there. I always like to hopefully let people go with their held their head held high and not necessarily you know, leaving with their tail tuck between their legs unless that is deservedly so, right? Unless they did something that was out of integrity or anything like that. But yes, I'll leave it at that <laugh>. Alright guys, appreciate you.

Our Apex Intro Video To Core Values

Yeah, guys Terry here. Just a quick intro video to the next quick intro video. Although the next one's not as quick as this one, but I just thought I'd put a face to the name here. So please make sure your is and brains and minds are open to everything. You're about to hear because it is all incredibly important and we're gonna be jumping in to our core values principles

what we live and breathe every single day and I will see you on the other side. Cheers guys. Hey guys, what is up? Terry here wanted to say a quick welcome and great work for taking action and the first step into potentially becoming part of this phenomenal organization we have here. So the next step would be to have a one-on-one talk with myself though. Before we do that. I wanted to break down just a couple of things for you before. And just so that you are fully aware of who we are and what we do so you can effectively prepare for our call.

So here we go. Our vision Apex Holdings is a portfolio of companies that has one simple mission and vision to serve as an organism. That's right.

You heard me as an organism that makes the lives of two groups of people exponentially better. Number one that first group the team our organization does not serve just one person or one group of people, but every person on our team is bought in because they know that being part of this team is the vehicle that will help them get to their own personal Vision faster than they could anywhere else number two, our clients and customers every offer and Company in our portfolio delivers five star results every single Time and over exceeds any of our clients and customers expectations. We know that any time A dollar is given to Apex Holdings on the other side of that dollar is a human's life that has changed forever as a result. It's all about impact and integrity is the North Star that guides every decision. We make as a team. All right, so let's dig into a little bit of our core values and principles here in no particular order. I'll start with saying number one is is always bought in and being obsessed everyone on our team must be brought in and all in obsession is the bonding point and shared commonality of every person on our team in our lives. Only two things matter our most important relationships and the vision nothing else is on our plate. We have blinders on the moment. We step on field. We are animals that are impossible. Too distract we are obsessed. We attack the vision like our life depends on it changing lives baby. So number two is integrity and intentions everything I'm saying right now, you will feel in the first 10 seconds of being within one of our morning meetings, which I lead every single day Monday through Friday everything I'm

staying now, you will feel in the first 10 seconds of the first morning meeting you are ever on that is my guarantee to you. So we genuinely care about people like I said impact is the North Star that guys every decision we make we do not live out to in we live in to out. We are ultimately on the field to be a blessing not to be blessed. We have a similar approach to

the military Special Forces. Yes, we are savages. We're obsessed and always all in number three hunger humility and coachability. Our hunger is Never Satisfied we haven't Is fightable hunger to learn become more skilled grow improve get better become more intelligent sharpen our tools sharpen our axes, whatever till you wanna use and ultimately progress. We are willing to drop our ego. I've got a tattoo on my right wrist here that says ego is the enemy Incredible Book

by Ryan holiday all about stoicism and the great Greek philosophers and stoics of our of our well, not our time but of history and we understand that we don't matter and our feelings don't matter. Our vision is what matters we thank this version of our self for getting us to where we are. But we are aggressively sprinting towards the next version of our self. We know that complacency is the enemy of success and we defeat that enemy every day. There's always another level to get to right always more you can learn always more you can evolve into one of my favorite sayings is my good friend Charles.

All in that I've actually got framed above my my desk here, which is it is all about Evolution. It is not the strongest of the species that survives nor the most intelligent but those most responsive to change good old Charles Darwin there.

All right number four trusting the process and doing your job. So at the end of the day, we know that our vision is not something we can control all we can control is the process and we know that if we simply follow the process every single day accomplishing our vision is absolutely inevitable. So for us our vision is something we remind ourselves of a few times a day to reinvigorate

our desire and then we forget about it and refocus ourselves on the exact part of the process that we are in right now this very moment. We believe in being where our feet are and giving a hundred percent of ourselves to the process.

And requires us to do in the exact moment that you are in even if the task at hand seems small we do it like it is the sole thing that will determine whether or not we accomplish our vision because ultimately moments like that compounded over time is the only thing that will determine whether or not we accomplish our vision number five discipline and doing the hard things. Our team Prides ourselves on the ability to do the

hard things on the inevitable days. We don't feel like following the process. We pick our head up and do it to the best of our ability. Anyway, that discipline is the reason our vision is a practical reality. We

Advanced towards every single friggin day versus a hollow dream. There's really only benefit is is hype and dopamine we're not about that. We're about actual results and accomplishing what the vision is. All right number six togetherness and teamwork. We are a unit we are United is one for all and all for one. We give our team the red gift of trust and loyalty we have each other's backs. We are a team on an adventure together through this giant rock that is spinning around and hurling through space around our sun. Right? We're all in it together during the good during the bad the successes the

failures the winnings the losings we are willing to roll with the punches as a team because we know that on our journey punches will be thrown there will be obstacles in the way. Another of my favorite quotes that's tattooed on my left wrist is the obstacle is the way another fantastic book by Ryan holiday or based around stoicism. Therefore adaptability is one of our number one assets. And as a team player, we take personal responsibility

for the performance and energy of our team. We know that leadership is a choice not a position and all of you are leaders. So we do everything in our power to help the Unit win and provide value to every person on our team. We know that when our team wins we win when our company wins we win when the portfolio wins. We win number seven radical transparency and over communication. We

never hesitate to be radically transparent. We know that with the right and respectful approach no conversation idea feedback are off limits. We have a 24/7 open Dialogue on any topic and our radical transparency is rapid we waste no time communicating we let nothing bottle up or build up over time because we know that is one of the fastest paths to resentment and ultimately is the breaking point of togetherness when something is on our mind, we have the backbone to elegantly say it to the team or individual that it is applicable too and not only do we communicate with radical transparency, but we are okay when Those are radically transparent to us. We have the humility to take it and try to find what is right not who is right over communicating is our only type of communication. We communicate everything when it

feels completely unnecessary or whether it feels completely unnecessary. If we think there is even a 1% chance that we aren't on the same page with someone even on small miscellaneous minuscule stuff. We communicate clearly and immediately until that 1% is eradicated number eight hundred percent say do ratio we refuse to have anything less than a hundred percent say do ratio we do exactly what we say. We are going to do how

we say we are going to do it and when we say we are going to do it and the moment that we see for any reason that even one of those three things are going to change we communicate it to whoever we made those.

Commitments to we want to have a considerate done team when the moment someone asks someone to do it. They can consider it already done because the say do ratio of our team is so high and to that standard of Excellence number nine energy and attitude. Our team exudes enthusiasm.

Again, you're gonna feel it on every single morning meeting and every meeting you have you can feel our energy just by spending a second with our team. Our energy is infectious. We love life and we love our job for us attitude is everything and having a bad attitude is absolutely unacceptable in our culture. No

matter what happens in the external World our internal attitude and energy remains untouched. You cannot even scratch the surface of it. We carry an energy and attitude of momentum and excitement and Excellence always and this is noticed by every human that crosses our path number 10 extra mile and standard of Excellence as I just mentioned our expectation is to exceed expectations. Our team has a habit of over delivering we find fulfillment in doing more than expected and going above and beyond we demand a standard of Excellence in every area of our process. We have a sense of pride in what we do we care about what we do and know that how you do even the smallest thing is ultimately what will determine how the biggest things go. We have a standard that most people cannot even relate with or handle. But as a result, we have success the most people will never ever even see let alone be a part of our standard of Excellence allows us to achieve our standard of results number 11 conviction and faith. Our team has unwavering conviction in who we are what we stand for and where we are going every individual on our team has a deep rooted faith in themselves the offer they sell and our port Earlier as a whole we know that Although our team may be full of a lot of energy that energy is not hike couldn't be further from everything. We say we do every goal. We set we hit every Vision we have we achieve or in the process of achieving it's an identity for us. We vibrate on a frequency of faith and conviction. All right. So that was my little rant there on our core values and principles. We live and breathe that every second of every hour of every day of every week of every month of every year of every decade and on to Infinity. All right guys, appreciate you for watching Hope you had your ears and mind and brain switched on for that. So I will see you on the other side. Can't wait for it. Less freaking go.