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[Rachael Davis] (0:00 - 2:32)

This is gone. So, what we're talking about today is management, guys. My Lauren on Property Entrepreneurs had some technical issues getting it live on Facebook.

So, if anyone sees any queries on Facebook about getting into this, if everyone can just let them know that it's not on Facebook Live at the minute due to a technical issue, but it is being recorded, yeah? And Lauren will have to see what she can do in the background. So, apologies about that for those who were hoping to just log into it on Facebook.

What we're going to be talking about today is management. So, we're going to carry on from where we were when we talked about hiring and follow that on. And we're just going to do a deep dive into some of the things that I've been doing over the years on Property Entrepreneur.

But one of the things to mention is there's some people on this call with a lot of management experience as well. So, what we'll do is we'll save some time at the end for questions and I will help with questions as well. But if someone's got some experience they'd like to share, then at that point, it's definitely beneficial to share it to help people in the group.

I think from my experience going around the track on Property Entrepreneur, one of the challenges you might find is if you've never done weekly check-ins with your team, and today we talk about you doing that and you try and put it in place, one of the challenges you might find is that you'll get pushback because it's something they've done before. So, what we'll try and do is we'll cover off for the next 15 minutes, 20 minutes, we'll try and cover off as much as possible of the content that I just wanted to go into detail with you on. So, that's how I do it in practice.

And then what we'll do is we'll spend hopefully 15, 20 minutes on questions with anyone who's having trouble applying this in the real world, because in the real world, this is where the challenges come. And that's what today is all about, is helping you get through some of those challenges, or some of the worries that you might have, that you haven't implemented it yet, but there's something mentally holding you back. And then where everyone else has got any experience that they think is valuable to share, then please do share it when we're doing the questions at the end.

Does that sound okay for everybody? Thumbs up? Yeah?

Awesome. So, what I'm going to do now is I'm going to share my screen. I've got a presentation and if you want it, Lauren, I hope she's still on here because host has disabled participant sharing.

Okay, so that's not good. All right. You've got to let me know if you can see my screen in a minute, yeah?

[Attendee 1] (2:34 - 2:36)

And I can see it.

[Rachael Davis] (2:36 - 3:49)

Right, cool. So, let me just get back to my presentation, see if I can get it up on the screen. No, it's not that one.

You can tell that I've been writing this recently. It's not that one. I've got three presentations up on the screen at the same time.

That's clever. Right, here we go. So, let's start this.

Come on. There we go. All right.

So, sorry, my screen is dreadful where I live, so apologies for that. Okay. The external, we're having quite a lot of technical issues at the minute, guys, so just bear with me.

Lauren from Property Entrepreneur, are you still on? I can't share my screen. Try again.

I am. Yeah, Lauren, I keep switching off my share screen. Yeah, so just, can you stay on the line and make sure that it doesn't happen again?

It just came off the screen. So, can everyone, can I get a thumbs up, particularly from Grant, because I can see Grant and Jasmine. Can you tell me if you can see the screen?

[Attendee 1] (3:50 - 3:50)

Yeah, you're all good.

[Rachael Davis] (3:51 - 5:08)

Right, sorry. Yeah, there's just a few technical difficulties. Right.

So, we're going to cover these things off. So, we're going to talk about KPIs and scorecards and how I use them in practice. Now, for some of you, you'll be using these at a much more complex level than me, because I've just got virtual assistants at the minute.

So, do note, this is how I use it with virtual assistants and how I would use it with a property manager. We'll talk about adopting SES in practice. So, that's how to check in with people weekly.

And then we'll finish on boarding. Yeah. And then we'll go to questions.

Yeah. So, that's what we're going to cover off. I just wanted to remind you all something we talked about in the session when we did Property Entrepreneur, when Adam was on the stage.

And he just said that, remember, management is all the structure and all the fixed stuff. So, this is all the black and white. You're performing, you're not performing.

This is an issue. This is not an issue. It's not the fun stuff.

So, that's why this can be sometimes quite difficult, can't it? And one of the things to make sure you've got is something like this, which is really, for me, it's really, if you've got a smaller business, it's even easier to do this. Yeah.

So, Grant, how many team members have you got? 10? 20?

[Attendee 1] (5:09 - 5:15)

Yeah. I think we've got about, well, like, employees that we manage on a regular basis.

[Rachael Davis] (5:15 - 20:50)

Yeah. Right. So, you've got, yours is more complicated than this, for sure, because you've got a lot more going on.

But for me, there's me, there's Victoria, there's Leah, and there's Michelle, and that's it. And generally, on in the HMO business, Michelle's not involved because she's a social media assistant now. So, you want to have one of those.

And then from that, you want to make sure that each person within your team has got clear responsibilities. So, you can do some of this stuff when you're writing your job description, you will have key responsibilities and expectations of the person in the role. So, this is just, if you've already done a job description, this should be an exercise of just expanding on that.

So, you must make sure that when you've got somebody new starting with you, it's very clear to them who does what in the company. So, who's in charge of marketing? Who's in charge of sales?

You might have more than one person in charge of sales. It just depends on who's doing finance and who's doing all of these different roles, which is what I've just shown you in the previous one. So, if you go back to this, marketing, sales, operations, and finance have the clarity so that you can show someone who does what in the business.

And then each role and responsibility should have something that looks a little bit like this. So, this is for a personal assistant. This is me telling the personal assistant what their key responsibilities are and what their KPIs are.

The difference with the KPI is that you'll hold them to account for something. So, mine are no calendar clashes, 100% on the SLA agreement, which is they have to respond to a prospect or a tenant within 48 hours. Yeah, mine's a small business.

I didn't need to make it 24 or less than that. And then if they're helping me with finance, there might be something about arrears in there. Yeah.

And those are the things that I hold her accountable to. So, when she starts the role, she's very clear on the three things that I might manage her on and then what her key responsibilities are. So, when you're starting off someone new, whether it's a personal assistant, whether it's a property manager, you need to have something like this already written down, ready for them to go, part of the onboarding process.

And I think we talked about that in the property entrepreneur when we were on the stage. So, make sure you go back and make sure this is done. It's really easy to overlook it because you think, oh, I'll just explain it.

So, the blazes out there might be happy to just explain how this works, but no one is going to remember what you told them. So, you need to have it in writing. So, those who were steals and tempos, get this written down and then you've done it for good.

So, do remember when you're feeling a bit of pressure about onboarding, that once the job's done and you just need to tweak it as you go along. So, don't feel too disheartened about, oh my God, I've got loads of work to do. Get it done once, it's done.

And then just evolve it as you go along. Mine, every year it evolves. And then as you're moving through to dashboards.

So, on advanced, we have more, I guess, more in-depth dashboards. But when you're doing, like for me, for a property manager, some of the things I really needed a property manager to be able to do is fill in a report for me. So, she will report on room sales.

So, she'll be looking at, it might be actually this part of it, I might get my personal assistant to do. So, she'll fill in what viewings have been done, what sales have been done and what conversions have been made. Because we don't remember with a scorecard, we don't want the person responsible for getting the results to fill in the scorecard.

But then I also have credit control, rent revenue voids, monthly arrears and historic arrears, compliance, which is all about certification, certs all completed, certificates due and certificates overdue. And then operations, which is onboarding, offboarding and occupancy. And that is all in my report.

We do a lot of this on advanced, but you want some kind of dashboard for a property manager, if you're going to have one that covers off some of these key things. So, they report my HMO business is small. So, I just report on all of it.

Yeah, this is the whole picture. This is what it looks like and I've got all of the revenues. So, that's something that will be part filled in by the property manager, potentially me and potentially my assistant will help me fill in some of the numbers or I'll certainly check them before they're ready to go.

With virtual assistants, there is a temptation to overcomplicate scorecards and with any team member, you know, I would say that you need to keep them as simple as possible and have like some kind of red or green. They're achieving what you need them to achieve or they're not. Yeah, and it keeps it nice and simple.

With my virtual assistants, all I'm tracking is what hours they log versus what we've agreed because mine are on fixed hourly contracts, what issues I'm having, whether they've reached their SLA agreements and then I do have comments, yeah, to keep a track of where I am with them. Yeah, and this is kind of what it looks like. It's really simple.

It's not overcomplicated. You want to have something similar to this. If you've got a virtual assistant, you might only want to track their hours.

Yeah, and if that's the case, that's fine. So, don't feel like you need to overcomplicate scorecards. They, you know, some people have a tendency to want to add lots of information into a spreadsheet, but I would say that it's the opposite.

You need to track it, make it as simple as possible and if you're having the team members do these, so grant for your team, I imagine you've got people filling in scorecards for you, just making sure that they're simple, you know, or K's making sure that they're simple enough that they're easy enough for people to fill them in on a regular basis because the more information you track, the harder it is for them to fill in the report, the less likely that will get filled in.

So, it's just something that I've experienced in practice and the same with my social media assistant. I created a new scorecard for her this month because she's new to social media for me and I'm noticing now I'm having issues with her hours. So, it might be a problem that I've set.

So, it might be that actually it's not realistic for her to do it in 10 hours a month. It might be that I need to make her increase her hours or it might be that she's just doing too much. So, it's, again, I'm tracking what the issues are so that I can keep a conversation going, you know, her regular.

I only do monthly ones with her because I only, she does my social media posting for me and then rolls quite simple. So, we meet on a monthly basis but my personal assistant and my HMO administrator, I, you know, I check in with them on a weekly basis. So, that's scorecards on a really simple basis that I've set up recently to track my virtual assistants and then I've got a dashboard for my HMOs that I run the data off so I can clearly see credit control, room sales and also how we're getting on with onboarding and occupancy and they're the key things that I track within the business.

So, that's the joy of scorecards and dashboards that can help you understand where you are progress-wise. Some of you might already have versions of this already. So, you might be doing everything you need to be doing already on scorecards and tracking performance and that's, you know, if you're already at that point then that's brilliant but for some of you, you might never have thought about this or not even started so it kind of trying to cater for everybody.

On the SCS, so, if you can do anything first before you get into accountability charts and scorecards and all of those things, if all of this is new to you and you've not done anything like this before in terms of management, then what I suggest you do do is do this first. So, what we mean by SCS is you have a, it's a weekly thing, you set them up for the week, you check in with them and then you sign off, yeah, and that's what you do. And my first tip here is that you can do this on a working document, on a Word document, I think Adam does that and he does it, he must track some stuff through email, I'm not entirely sure, but he does it all on a Word document and maybe there's enough information on that Word document, so keep it all in one place.

So, Adam keeps it on a Word doc, I keep everything in Asana, yeah, so that, this is a really good example of my one-to-one notes for Leah. I do them year by year, so I have her notes in here and you see there it says one-to-one notes for the sixth of May, that's got a list of all the tasks in it, then anything that she is waiting for me to approve is down below here, yeah, and that, I like that because it makes it clear, like she's done some work but actually these tasks need sign off, so some tasks she'll just do them and get them done and I won't need to check them and some things are bigger, like HMR licence renewals are much bigger and need a second eye on them, you know, I'm tweaking them, I have a spreadsheet as I use it, she's making the changes to it as we go along, that needs my eye on it because it's a big process that we run, yeah, so the bigger jobs sit on my waiting on approval list, so I can quite clearly see where I'm at with her and the other reason that's important or it helps me, you might adopt a slightly different system but as long as it does the same thing, often with assistants who work for you, the thing that holds them up is you, yeah, as much as we like to be, we think we're great leaders, we're often not great managers because we're busy and you get lost in a lot of detail or doing something else and you can hold them up by not approving some of the key things that they need to approve, so it just shows you, look you can see how behind I am on those, the dates are in there but when she did the work and I haven't checked them since, so it just shows you in real life, I know I'm holding her up on certain things and I need to get them moving but I've given her other tasks since, so she's still working for me but there I know I've got to get them done, so that's worth mentioning, this is just a close-up, the other thing I do in my one-to-one is have an agenda and a few of you have asked about agendas and these are kind of what we discuss, agendas are really, really important because you can have a meeting with your virtual assistant, with a team member but if you don't stick to an agenda the time can go on for too long, I don't know if any of you have had this already where you've had a meeting set in your diary with a team member for 30 minutes and it ends up at an hour and a half, so this is a way to avoid it, so I would actually say you can go a step further than this and actually put an allocation of time next to each discussion point, how long is it going to take you to talk through their tasks, they should be responsible for adding their tasks into their one-to-one lists, so you should have a list of tasks in that list, in the one-to-one notes to say this is everything she's got to do this week, but how long do you want to spend on it, five minutes, ten minutes and then a discussion of what outcomes for those, what's the outcomes or the major priorities for this month, that could be part of the agenda and how long are you going to spend on discussion of the top three priorities for example, if you've got a my house spreadsheet you might want to talk about that and have a review of it and has everything been ticked and are we up to date on it, are we behind on anything, how long do you want to spend talking about that and if you've got a scorecard you want to bring that up in the meeting and talk to them about their progress on the scorecard and how long do you want to spend on that and at the end I highly recommend that you ask them, you share feedback with them on how you found them this week, what have they done right, what have they done wrong, what have they missed and then you invite them to give you feedback on what they've found about you and equally you want to encourage them to tell you where you might have done something wrong, really, really important, I sent a task to Aaliyah this week, I actually put the wrong date on it and she messed it up because I'd actually gave her the instruction wrong, in our one-to-one meeting we went through what went wrong and it was me, I messed it up, so sometimes you need to have that nice open dialogue, spend a little bit more time on the challenges, what have you found difficult with the person that you're speaking to, what have they found difficult for you, now you might want to do it, you might want to get them to share the challenges first and then you give your feedback, do it in a constructive way, try not to make it sound like you're criticising, you've got to do it in a constructive way, which means you've done great in all of these areas but what I found is in this area, I've had a few challenges or you can ask for clarification which I did, on this task Aaliyah, did I give you the right date and we look back over WhatsApp and find out what happened because you've booked it in the diary incorrectly and then as it transpired it was me, so don't assume, the other thing that I've done and made a lot of mistakes on in the past and I'm sure quite a few of you can probably agree with me is assumptions can really kill a relationship because if you're constantly assuming that they're wrong it can really put a dent in your relationship with them because it's more often than not it's you, not always and you've got to find and we'll talk about this a little bit more but you've got to find a clear line between what's their fault and what's your fault and the only way to do that is to seek clarification in one-to-one meetings and you'll certainly start to see who's at fault for certain things, why mistakes have got made and then add the comments in, so I can show you my live one-to-one sessions if you want in a minute, we'll go into it if you want to see it in practice but there's a long list of things comments on my one-to-one notes of where I've highlighted issues and where we've resolved them so I can see it play out in the one-to-one and the really important thing about Asana and other management tools is it's kept all in one place, I find that really really useful, so a couple of top tips from me, I use Asana or Trello because everything's in one place and you can find it when you're doing quarterly reviews about performance, you will not remember everything, you've got a scorecard, hopefully you'll log some things on the scorecard but for some richer detail you might want to take it from your one-to-one notes on Asana or Trello or on the word document if you actually don't want to use one of these management tools, you just must have everything updated and written down, if you're a blaze and you're not great at the detail you need to have a think about how you'll deal with this because it really is important that you do, I'm looking at Graham, sorry, you might be actually really good at this now, over time you get better at it so for those of you who are thinking oh my god, you know, I'm listening to this from a tempo, she's really good at writing notes, I'm not, I'm terrible, you're going to have to find a way to deal with that because you have to bring this structure into practice, you know, for those of you, my way of

[Attendee 1] (20:50 - 21:22)

doing it has been to try and automate as much as I can, that's a good tip, so basically automate stuff I don't enjoy doing, so either bringing someone in that is good at it and does it for me or it's an automated process, so you were just talking about note-taking, I've used Otter AI for a while, there's other things that can come in and do note-taking and then automatically email everyone out the action points and the summary afterwards so that you don't have to do it, so it's all about automation.

[Rachael Davis] (21:23 - 22:06)

Yeah, yeah and I think that's the right thing because if this is not your natural, because you can tell with me, it's my natural space, it's not, I don't find it difficult, I, it takes me a couple of minutes, it always takes longer, can I just explain, say this because you don't get the chance to stay, say it on the stage, it takes much longer for me to explain to you how I do it than to actually do it, right, I 100% promise you that, none of this takes me long to do, it takes a couple of minutes to write up some notes, you don't have to put an essay, sometimes I might do because I feel like I need it, but sometimes I don't and as, as I think Grant that's brilliant, for those of you who don't like taking notes, have Otter work, can you can just do that for if there's just a team of two of you, can you do that Grant, just two of you do it, I guess you can can't you?

[Attendee 1] (22:07 - 22:23)

Yeah, we're in the car yesterday or the other day with me and Kay and we basically just had a chat about business and I was just like stick on Otter so we don't forget anything. Yeah, it's a great idea. And it emails out the summary of our conversation and the action points afterwards.

[Rachael Davis] (22:23 - 22:25)

Do you have to pay for that Grant?

[Attendee 1] (22:26 - 22:27)

I think you do, yeah.

[Rachael Davis] (22:29 - 22:47)

One of the things to watch out for on Property Entrepreneur is that you don't end up spending an absolute fortune on loads of small apps, but it just depends on what your capacity is financially wise or what your budget is and that's absolutely true, if you can put this into play, it can make it a lot easier for you, yeah.

[Attendee 1] (22:48 - 23:06)

When you start bringing on people like executive assistants and stuff like that, you don't have to delegate out, you have to pay them to do note-taking because it's done for you, you know, and that's the thing is try and automate as much as you can because that will actually reduce your costs in the long run.

[Rachael Davis] (23:06 - 23:40)

Yeah, yeah, so there's a way around here, so if you're sat here thinking God I'm not, this isn't my strong point, then there are other ways, but for me I don't use Otter because it takes me a couple of minutes to actually write up my notes and I don't, for me at the minute it's not necessary, but again, small team, yeah, small hits you more business, bigger team, more requirements, then automation is the key here to make sure that you get these things added in and you could still use, I assume Grant, you could still use Athena to upload a document with the notes in it, yeah?

[Attendee 1] (23:40 - 23:42)

Yeah, I think you can link the two together.

[Rachael Davis] (23:43 - 23:44)

You probably could, you probably could.

[Attendee 1] (23:44 - 23:58)

We use Slack and Otter links to Slack, so whenever I've had a meeting, so basically my Otter is linked to every single meeting within the business, so it watches every meeting and then emails me the summary points after every meeting, so I don't even need to be in them all.

[Rachael Davis] (23:59 - 24:04)

Yeah, so that you've got, and if someone else holds the meeting instead of you, the notes will happen anyway.

[Attendee 1] (24:05 - 24:05)

Absolutely.

[Rachael Davis] (24:06 - 35:15)

Yeah, there you go. There's an absolutely fantastic solution if you have a bigger team, more going on, not enough time to do this. If you're starting from the beginning, because remember everyone on Property Entrepreneur, we're all at different points in the journey, so the idea of mid-week mentoring is that we cover it for everybody.

If you're starting off and it's just you and a virtual assistant, then you can start here. As your team gets bigger, business gets, or you get busier, then you can bring in things like Otter and link the two together, get the notes uploaded and then it's all done and dusted for you. Yeah, the other thing you can do as well, is you can also get the virtual assistant to write up some of the notes.

I don't do all of them, so all of the tasks that need to be done, the virtual assistant puts in, yeah, and the virtual assistant puts her comments in. She gives me regular updates twice a week on where she's up to, and then I just put in, I limit my, where I can to, I limit my updates to performance management issues, so where I've had a problem, yeah, where I think performance hasn't been where it should be, or, you know, we've had to investigate something, then that information goes on, so I limit my notes to performance management, rather than, I'm not writing her task list for her, she's doing that, so that's just something for you to remember. And so remember, tips are, stay on topic and set a time limit for your sessions with your team members, and try and stick to it, and then if you've got an agenda, and everyone should have an agenda, decide how long you're going to spend on each section. You can always tweak it if it turns out a little bit differently, but that will help you control how much time you spend with them, because I think if you're busy, that really matters as well.

And I think it's going to link into my asana there, but I might move on, because it's really, really slow. See if I can go to the next slide. Oh, it's, bear with me a second.

I'm going to come back out, find the slide, and jump back in, because it's on, go slow. Oh, sorry, it's really slow. Why are you taking so long to load?

Apologies for this. It's probably my internet. And so this just gives you an example of, oh, it's, sorry, my screen share's gone.

Let's try that again. So just, these are some of the notes I've done recently. Sometimes I write a couple of bullet points, sometimes I hardly write anything.

It took me less than two minutes to write that. And sometimes, always make sure you, in the meetings, you're telling them when they're doing a really good job. They really, really need those, they need accountability spikes about, you know, the accountability spike is having the check-in that you're doing with them.

But also, they do need encouragement along the way, don't they? Otherwise, it's, you know, it makes things very hard for them. So this is just an example of me using asana, and writing up notes afterwards, and talking to them about the main priorities we discussed.

The reason I did this was because she had about 15 things on her to-do list, and I wanted to make sure that four of them were, like, really high, on a, like, four were high priority. And we talked about her doing really well on doing some really proactive front-of-ears chasing for me, and that's, you know, that's the kind of feedback that I give her on a weekly basis. I don't know why, but I can't get mine.

And then, the other thing that I do on, with my virtual assistants, is I give them mantras to remember things by. So I think virtual assistants have a tendency to rush things. They may not read the information properly, and then they do the task.

They haven't quite got it right, because they haven't read all of the details. So one of the mantras that I'm working on with Leah at the moment is read everything first, before she starts. So it's just a top tip, is to give them mantras of things that they need to, like, keep in mind when they're doing something.

So if you're having a little, you know, in training, when you're doing on-boarding, they're going to start making mistakes. Make a mantra out of something you've seen that they've repeated a couple of times, and keep talking to them about it. And that might help them.

And then, make sure when you start someone new, that they've got a guide. So I've got a guide to my one-to-ones. There's a loom on it, and there's also some clarity around what it means, what SES stands for, what to expect.

We're going to do a video call on a Monday. You're going to check in with me with a progress report on a Sunday or on a Wednesday. And then, Fridays, you're going to sign off what work you've completed.

And that is the process that we go through. Then, when there's a team meeting, it explains what's involved in the team meeting. So that's something else that you should make sure you have, alongside actually doing the SES.

So, you know, if Monday, Wednesday, and Friday doesn't work for you, then change it, yeah? But have some kind of setup, check-in, and sign-off process, and then have it in a document with an explanation, so that they're very clear when they start, what's required of them, and they can just start doing it. And then, again, processes.

I'm not going to spend too long on this, but your processes are really key. And where you find mistakes happening, you need to look at what process you've built for them, re-evaluate it, and update it to make sure that the process doesn't happen again. Because, in the end, if your processes aren't strong enough, then there will be mistakes.

And this is where you really put your skills to the test, in terms of all that winner-hit-list work that you've done recently, is this up to scratch? So, have you done enough of the process? And what you'll find is that, when you're having problems with a new team member, it's often because the process isn't strong enough, so you need to go back and evaluate, yeah?

What you've done, and what you probably need to redo, in order to get that right. So my tip here is, examine what you've given them, and how you've given them the information. Solve what can fix the problem.

So what extra information can you give them, or what can you write in the process, that's going to help fix the problem you've just had? Make sure the process gets rewritten, or updated, and then get them to follow the new process. And that is how you will correct it.

You know, it might be that you need to do a video on loom, for some clarity. Get that done. You know, these small things, they don't take long to do.

Well, as Grant suggested, if there's some automation you can add in, that will solve the problem, add in the automation, and then just get them started on the updated process as soon as possible, and then watch them go through it, and see how they get on, and see if the problem gets fixed. And you may need to do that, several times over, until everything works properly, because it might be a lack of clarity in your process, that's causing the mistakes by your members. And that's where you've got to start.

Is the process good enough? And then after that, you just coach them to success. And once you've ironed out the issue, and they're doing everything as they're supposed to, because your process is robust enough, then the job is done.

However, if you do all of these things, and make all of these changes, and they're still not making enough progress, yeah, and they're still making mistakes, then it could be a performance management issue. But you need to be clear that you've done everything you can, because everything starts and ends with you. Make sure you're clear that you've done everything you need to do, and given them the right process, and the right detail, and the right automation, and everything you've done your side, before you start to realize it's a performance management issue.

And then after that, you need to be addressing them weekly, talking about their performance management, and then following a performance management guideline. And we can talk more about that in a second, if that's of interest to you. And then when you bring someone on board, you need to make sure that your onboarding processes are clear.

So when with a proxy manager, what I've done is I created a training manual, and make sure you've got checklists for things that you need to set up before and after they start. So good things that like, what do they need to set? We talked about this at the workshop on the day, but the detail, what do they need access to?

So email, toggle, your digital vault, Asana, your systems management, your proxy management system, your form builder system, do they need access to Loom, their bank details, have they signed their contract, all of those things. You need a headshot for their email signature. All of this stuff needs to be in a document that you can tick off and make sure it's done.

And they can tick off and make sure it's been set up and done, because they can help guide you through the process as you set them up. And that's really, really important. So have a new start admin checklist.

I think that's really, really key to get them going. And then make sure you show them what to expect through the process. Did everyone get the onboarding document?

Hands in the air, did you get the onboarding document? That's a really good template. For some of you, you might be just looking at that and saying, is the current process I've got robust?

Does it look like this? Excellent, tick. If not, you might be building it from scratch, but use the template.

These are the ones I already had set up, but they're roughly based on it. So I'm explaining to them what happens from week one to week four in their induction. And then there's a link to everything.

So when people get started, the biggest challenge they might have is orientation. So where do they find things in your business? Where's the accountability chart and the job description?

Where's their contract? Where's a link to the guide to toggle? All of the set of procedures that you're starting them off with, how do they get to a signer?

All of that, you might want it all in one place in a training manual so that they can link to everything they need from one place. And then slowly but surely, you can walk them around your Google Drive during the induction or your OneDrive and they can find everything. So I think orientation is really, really important.

So really good to have it linked all in a training manual, all linked together. That's what I've done. And then create a schedule.

So when you're onboarding somebody new, you should have an onboarding schedule that tells them every day of the week what's happening with who and what things they'll be covering. This is just an example of mine. When it starts, when it ends, who it's with, so they've got clarity.

That was all booked in the diary. It has made the process really, really easy to do. And then you just need to show up, remind yourself what you're doing, and then get on and cover those things off in your induction.

So I highly recommend that you have the detail as well as the training manual. It makes a massive difference. And it also looks really professional, that everything's booked in the diary.

Everyone knows what they're doing. Grant, I imagine with yours, you have lots of different team members that they have an induction with. Do you orientate them around the business when they start?

[Attendee 1] (35:16 - 35:53)

Yeah. So we've got a whole host of processes and things that everyone needs to go through as part of their induction process. So each role has a job description.

Each role has an onboarding checklist. Each role has a probation review process. And then based on the role, that will decide what processes and procedures you have to go through and learn and have signed off essentially within the first few weeks.

And then your sort of second and third month of the probation is how well you actually deliver the results that you're supposed to deliver.

[Rachael Davis] (35:53 - 45:02)

Yeah. And of course, it depends on the size of your team. But if you've got from a small to a medium-sized team, whatever you might have, it's just very clear that they need to go somewhere where they know what they need to look at, what's relevant to them, what's their job description, what's their personal development plan if they've got one or a first contract.

Is there a scorecard that relates to them? Can they get access to that? What checklists are relevant for them?

All of that. And you walk them through and then they meet different team members if that's relevant. They can get introduced to the different team members in the business and what they do and some of the relevant information according to them.

Obviously, don't forget to put in lunches and time spent with them so you can get to know them. That borders on the fluffy stuff, which is the culture, but gets them introduced, makes them feel at home, makes them feel welcome. All of that's a really important part of the induction process as well.

So make sure the structure's in there and the information they need to understand their role is in there. Make sure that their setup process is a checklist and everything's getting done. If you need to provide them with a computer or an email account, as I've talked about already, all of that's in there and you go through the process and set all of that up.

And it's clear to them when that's going to happen. Then that makes it all look very professional and very easy. But on top of that, making sure that they go out on a team lunch with you or you take them out for lunch.

If they're someone you do it in person with. If they're not someone you do it in person with and they're remote, then you can have lunch together. You can shout their lunch and have a lunch with them.

Or that you can just make sandwiches and have a chit chat for 30 minutes. That's the kind of thing you can do remotely. We talked about it in the workshop.

There's lots of creative things you can do even with remote teams to make them feel at home. But that's really important that that's a part of the process as well. And then if you've got something like my house, then make sure it's involved in the induction process.

And for me, this is where all my processes live. So, you know, the person, you know, whether it's a virtual assistant or a property manager, for me, they need to walk through all of this and have a look at how it works. Click on all of the links, watch all the videos, go through all the processes.

That's really, really important. That's how I do it using my house. And that's part of the, I've made that part of the induction process.

And then Loom, I can't, I know for some people, I don't actually enjoy doing videos. I actually find them quite difficult to do because I get interrupted. But that might be because I'm a mum.

But for some of you, you might find this really easy. And for those of you who have lasers, I imagine this is an easier thing to do. I do get them done.

I don't always enjoy them, but it's mainly the interruptions I find difficult. But they actually work brilliantly when you're trying to bring on new team members, because you can, instead of just doing the work yourself, you can do a video before you onboard someone so that you've got the video done and dusted by the time they start. Or if you're finding that you haven't done enough process and you're needing to revisit this, then adding in some extra Loom videos might really help to make sure that the team members, you know, stop making the mistakes that they're currently making.

But they are great for context. We've talked about this before. Documents are for the content.

Looms are for the context, so explaining where everything is. And in terms of orientation, Loom is fantastic for showing people where in the drive to find information and get, you know, their checklist from or their job descriptions from or their personal development plans or phase contracts or whatever it might be. You know, you can show them where to find things.

And that's a really good thing to think about Loom. It's good for context. It's quick and easy to do for you.

It's a smaller investment of your time. And you can then just record. You can keep them in Loom, but you can also download them as well.

So you can actually save them in your drive. So you could maybe pay for Loom for a small period of time and download all the videos and then go on to the free version, you know, depending on your budget. And, you know, it just depends on how much you want to pay for these things.

But the paid for version is about, I think it's 10, 11 pounds a month, something like that. But, you know, it's really, really handy. And again, there's probably other tools out there that are like this.

And they also do a transcribed service on Loom as well. So that's just worth pointing out that you can get that as well. So that's, you know, using Loom.

And then this is just an example of one. I had an issue recently. So my virtual assistant was downloading my Asana process for my onboarding.

And when she was duplicating the process, she wasn't ticking the assign e-box. So when you duplicate, you choose what information you get back through when you duplicate the project. And she wasn't putting the assignees in.

And so she was all over the place, not knowing who was doing what. And I was like, but that's already set. So I picked it up, did a coaching call with her about the issue.

And then out of that coaching call, she was like, I need to remember how to do this. I did a video, the issue solved. She'll never get that wrong again, because now we've got a video on it.

So it's done and dusted. So it's really good to use Loom on the go just to correct mistakes that you weren't expecting to happen. You know, my onboarding process is really good, but I wasn't expecting her not to duplicate the assignees in Asana.

It was a surprise. She's only been doing, she's only been working on my HMR work for the last three months. So, you know, everything's going brilliantly, but it was just something that I picked up in the process.

So when you pick up a problem, Loom can really easily sort it out. So that's just like one in practice. This is just an example.

Then I've posted it in Asana, and then I've logged it on the scorecard. So I know that it's now being resolved. So that's just how you can follow it through.

And then just some tips, and I'm not going to cover these, but it's just, if you're really busy and you're really stressed about onboarding, then use all of the tutorials at your, like Grant said, automate what you can. But Asana, Xero, Trello, they've all got tutorials built in with them. You don't need to show them how to use these things.

They can learn it inside the web portal themselves. Loom is a really quick way of doing things, but keeping things as simple as possible. Don't make it complicated.

You know, if you're a steel or a tempo on this call, you will overcomplicate things and then have to unravel it later. Try to avoid that. Learn from my mistakes.

If you're a blaze, you know, you want to keep this simple and automate it as much as possible. It does really make a massive difference what wealth dynamic you are and how you deal with this. So I know I feel like I've labored it a bit, but it really does make a massive difference in practice.

So just be aware of what your wealth dynamic is and what you need to lean towards. But if you are a steel or a tempo, don't overcomplicate and do too much process. Try and keep it as simple as possible.

And it let it evolve. Let it evolve. Yeah.

So start off, I think this is actually start off with a checklist, let it evolve into something on Asana. You know, a process can be built over time. It doesn't have to start off really fancy.

It just, just start with something. It could be a checklist and then evolve it and get your, get your virtual assistants to build or your team to build it out later into something more complicated with, you know, approval processes and step by steps and, and different sections for each part of the, of the process. Do that later.

So, you know, don't think you've got to do everything all in one go. And then do this, as we said on, as you said in the workshop, train, trial and test them. So that's where Loom comes into it when you're trialing them and testing them.

Yeah. Loom is great for correcting things and coaching them through things. So you're not always on a call with them, coaching them.

You're actually just doing a quick video, coaching them through the problem and then posting it on Asana to tell them how to do it. Yeah. You could just do all of this in WhatsApp if you don't want to use Asana and then the, and then the problems resolved.

Yeah. And that's how, how to do it. With virtual assistants particularly, get them to repeat back to you what, how, what they've understood.

Yeah. So tell them what the task is. If it's a big chunky task, this is more relevant for, get them to repeat back to you what they think they're supposed to do.

Do not assume that they understand everything that you've written. They're not absolutely 100% brilliant at reading everything in written English. Just be aware of that.

You might get caught out with that one. So make sure they repeat it back to you and always give them feedback. And that's what that checking, that SES is all about.

And task-based learning is best. So you give them the task, you get them to repeat back to you how to do it, and then they go off and do it. Then you coach them through if they've done something not quite right.

You do that in a video, post it on their Asana, and then that's, and then that's the job done. Yeah. And then just rinse and repeat that process.

You've got to do a bit of handholding in the beginning. You cannot avoid it. If it's, if you don't want to be doing it, then make it somebody else's responsibility.

And if you've got a bigger team, that's always possible, isn't it? You don't do a lot. Do you do a lot of training?

Because the reason I talk to you is because you've got a much bigger team than me. So it's good to get that input.

[Attendee 1] (45:04 - 46:08)

Actually, what I do now is I do a lot of recording. So if I know that there's something that isn't a process or isn't out there, when I'm doing it, I'll record it on like Loom or Vimeo. I think we use Vimeo actually.

And then the rest of the process is automated. So I basically record it. That then gets transcribed by a transcriber.

That recording then goes into Otter.ai. The transcription from Otter.ai goes into ChatGPT to write the process. So I do the bit that I enjoy, which is recording the video and explaining what needs to be done. And then it all goes into a process from there.

So over the last few days, I've done a few tasks, and I've created four processes. And the process is once I've recorded the task, it probably took an extra couple of minutes because I'm just explaining it as opposed to just doing it. It was created within 10, 15 minutes after I recorded the video.

[Rachael Davis] (46:08 - 47:28)

Yeah. And then the other variation on that is if you've got a bit, that is an excellent explanation of how to do the task triangle. Remember we talked about that in the previous workshop in workshop seven, a task triangle is you do the bit you enjoy.

So for Grant, it's the talking piece. He does the video and then everything else. Now, the difference is he's using automation through ChatGPT, which you can do all through Otter.ai, because that's an AI tool as well. He's using those. What you could do is do the explanation, draw a picture. If you prefer drawing things out, you could do a video on Loom explaining it, then get the virtual assistant to build the process off the back of it.

So this is working out the bit that you enjoy and giving the other piece to either an AI or to a virtual assistant. Yeah. And that works both ways, but that's an excellent example of a task triangle, and that's what you want to do.

So work out the bit that you enjoy, do that bit. I often, I like drawing floor charts and things like that. So I'll often draw a picture.

Whatever it is that you like to do, get that bit done and then get everyone else in the team or use AI to help you, to transcribe it, to do the automation piece right out of the process. Have you found AI quite useful, Grant, and actually built doing the processes as you're writing the step-by-step guide? Has it worked?

[Attendee 1] (47:29 - 48:07)

Yeah, we use AI for quite a lot of stuff. They even use it in customer service to basically type out messages and responses to customers and things like that. We use it for everything, where we can, essentially.

And for $20 a month, ChatGPT is extremely good value and probably reduces down a lot of our time because we haven't had to use staff to do it. That's what I mean about automation actually costing you less in the long run, because it costs a lot less to get Otter to type up all your notes than it would a virtual assistant.

[Rachael Davis] (48:08 - 48:20)

Yeah, that's right. Well, yeah, arguably, yeah, it depends on how long it takes a virtual assistant, but you are absolutely right. So you're using AI as a replacement for an assistant there, I guess.

And you guys, have you got an EA?

[Attendee 1] (48:21 - 48:24)

Well, with that's what, so we've got VA and PA.

[Rachael Davis] (48:24 - 48:25)

Right, okay.

[Attendee 1] (48:25 - 48:28)

But we're recruiting an EA at the moment.

[Rachael Davis] (48:28 - 48:36)

Right. So it's just to help everybody else, Grant, with your VA, what does the VA do then, if you're using ChatGPT so heavily?

[Attendee 1] (48:37 - 48:39)

So I don't actually have the VAs.

[Rachael Davis] (48:39 - 48:39)

Right, fine.

[Attendee 1] (48:39 - 48:50)

A does. K's got the VAs, and they are actually more on the transactional, chasing everyone for stuff, making invoices, all the sort of running around, I guess.

[Rachael Davis] (48:50 - 49:11)

Yeah, fine. So that just gives you, I just wanted everyone to understand how you might use AI versus a virtual assistant there. I think that's really important.

Now, listen, that's the end of it for me. Have we got any questions from anyone about challenges, putting any of these kinds of ideas, onboarding, SES, using scorecards, using accountability charts and responsibility charts, anything like that?

[Attendee 3] (49:11 - 49:23)

Rachel, I've got two questions. I've posted them to you. But anyway, why are you using spreadsheets and not toggle to record their time, for example, or are you using both?

[Rachael Davis] (49:24 - 49:37)

Yeah, yeah. I know what the time is already. I just added it in, so I know what they've done.

What I'm tracking is what we agreed versus what they've done is all I'm tracking. Yeah, and it's all in toggle. That's how I know.

[Attendee 3] (49:38 - 49:42)

Okay. Would it not be easier to run the report on toggle? I'm just trying to think that way.

[Rachael Davis] (49:42 - 49:50)

Yeah, I do. I run the report, I look at what the hours are, and then I just put that in my scorecard. So that's all I'm doing.

[Attendee 3] (49:50 - 49:50)

Okay.

[Rachael Davis] (49:51 - 49:51)

Yeah.

[Attendee 3] (49:51 - 49:52)

Okay, great.

[Rachael Davis] (49:52 - 50:07)

I can have a glance at it. With scorecards, it's at a glance. Are they on track or are they not?

So when I'm doing quarterly reviews, I'm not spending too long assessing where they're up to. Yeah, that's all.

[Attendee 3] (50:07 - 50:23)

Sure. Great. And last question is, last time you recommended a password, like a sharing.

Yes. I know LastPass had a few security issues. So which software could you offer?

[Rachael Davis] (50:23 - 50:46)

Yeah. Well, I use what I call Keeper Security. It's highly, highly secure.

I don't recommend LastPass. I don't think it's secure enough. I know plenty of people have had issues with it, with their virtual assistants being able to see the passwords when they're in the site.

That's not what you want. I can't vouch for everybody, but I've had anecdotal information from people that LastPass has got.

[Attendee 3] (50:46 - 50:49)

Sure. So Keeper Security is the best one.

[Rachael Davis] (50:49 - 50:58)

Yeah. Keeper Security is the one that I use. There's a commercial version of it and a business version.

So there's a consumer-grade version, sorry, and there's a business version. Yeah.

[Attendee 3] (50:58 - 51:00)

Which one would you recommend?

[Rachael Davis] (51:01 - 51:27)

I guess it'll depend on what you want to spend, but I use the business version. Yeah. That's because we run a business, but I'm very digital fraud aware.

So I put a lot of emphasis on that side of it, but Keeper's works really well for us. I think it's worth reiterating that Adam uses a consumer one. He uses Bitwarden.

That's another one that you can use. Anyone else got any other digital vaults that they use?

[Attendee 4] (51:28 - 51:43)

I use Bitwarden. It's great. But actually, with my VA, I'm using LastPass just because Bitwarden doesn't have that feature to hide the password.

But you're right. You could probably find a way around it if you're smart enough to see the password.

[Rachael Davis] (51:44 - 52:50)

Yeah. Well, it shouldn't let you. That's the difference, Gabby.

The digital vault shouldn't allow the person who's logging in to be able to find the password anywhere and see it. It happened to one of my friends on Advance, and she said to me, she was in there doing some training with a virtual assistant. And as they brought up the LinkedIn, it was on LinkedIn, she went in using the digital vault.

But when she was in there, she could quite clearly see the password. Now, sometimes it's about the way you've set things up on your social media. Yeah.

So when you get a virtual assistant on board, you need to make sure that you've locked down your security settings on everything that you've got. So if there is an opportunity that you can only see the password if you log in. Some of them ask you to put a password in to see the password or some kind of security feature to see the password.

So you could do that. Or you use a digital vault that builds that layer of security in. Yeah.

So that's the other thing to know. I've got information on Keeper. If anybody wants it, just let me know afterwards.

Send me a message.

[Attendee 3] (52:50 - 52:51)

I would like some, please.

[Rachael Davis] (52:52 - 53:11)

Yeah, yeah. I'll get some information over to you. But yeah, you've just got to choose.

I think digital vaults are really important. So you've just got to choose what works for you. But there's two that I use Keeper.

I know about a bit warden. But yeah, there are many more out there if you do some research. Actually, there's quite a few.

Is there any other questions?

[Attendee 4] (53:13 - 53:26)

Quick one. I don't know how quick it is. I'm not sure how to set KPIs.

I give my VA tasks constantly. But I don't know how to measure a KPI for him.

[Rachael Davis] (53:26 - 53:36)

How do you know if they're doing well? What's your measure for them? I like your virtual assistant, by the way.

But how do you know if he's doing well? What makes you think he's doing well?

[Attendee 4] (53:40 - 53:42)

Just constant communication.

[Rachael Davis] (53:45 - 53:47)

What's your arrangement with him in terms of hours?

[Attendee 4] (53:49 - 53:51)

I think he's shifting towards full time now.

[Rachael Davis] (53:52 - 54:00)

Yeah. OK. So the contract agreement you've got with him, is it agreed hours?

Or is it you pay him for whatever work he does? How do you set it up?

[Attendee 4] (54:00 - 54:04)

Pay him by the hour. But there aren't any agreed hours.

[Rachael Davis] (54:04 - 58:01)

Right. So I don't know whether that'll help you. Because sometimes virtual assistants, it's not necessary.

So you don't need to measure if it's not necessary. Yeah, because it's only a virtual assistant. But at the same time, if you want some markers for are they being successful?

So for me, with a virtual assistant, it's great having them do tasks. But if they're making mistakes, then those kind of things need to be highlighted. Because that's the thing.

It's a coaching issue, a process issue, or it's performance. Yeah. So I track mistakes being made.

And that's what my little scorecard puts on. And it's KPI. Yeah.

Are there any issues? I think on mine, it was track their hours. Because sometimes what you find is I've got agreed hours, but sometimes they go way over the hours we've agreed.

And that's not in my budget. So it's just making sure they can manage their time effectively and work out when to do tasks. That's a basic requirement, I think, of a virtual assistant, being able to manage their time.

If they're just doing everything, some weeks you might give them more. If they're not following things to a priority list, good time management skills is really key. So I think that that's why I track hours to make sure that they're good at time management and task management.

So it depends what you've got. I think you need to sit down and have a think about what would show you that they're being a good virtual assistant. I mean, you might not be having any issues if he's not making any mistakes now.

But if there starts to be problems, then it's how will you track it? And I've got a service level agreement with mine. She has to respond to tenants and prospects within 48 hours.

Is that being done? You can track that through. I've copied in a lot of things.

I can see things being responded to. I just keep a mental note of that and highlight where someone's complained about not being responded to. It doesn't happen very often, but occasionally these things do.

So it depends on what you want to track. But you want to keep it simple. Don't overcomplicate it.

If you don't feel like you need to track anything at the minute for your virtual assistant, then don't. Yeah, but I've got three KPIs. No calendar clashes, so they haven't messed up my diary.

The second is that they answer people within 48 hours and the third is agreed hours they've been tracked. I'm checking toggle. Because the other thing, Gabby, if you're not checking on them, if you don't look back on toggle and see what they're doing, I found out once that my virtual assistant spent nine hours on a spreadsheet.

It's like, oh, that's completely unnecessary. Unless you're checking, you'll think they're doing a great job. But there needs to be some point where every month you look at something and review.

I review toggle. Those are the kind of things that need to go on those difficult conversation lists every week. I brought one up.

She spent nine hours on management. And I find out today from last week, and I find out today because she's not tracking toggle properly. And then we've had that performance in management conversation.

And I've said to her, you have to manage toggle properly or I will bring these up as performance issues. In a nicer way than that, of course. But that's me having regular difficult conversations and not letting issues run away with me.

It's really important that you don't just think they're doing fine because you're not checking anything. So a scorecard can make you check things. I have to check toggle every month to fill in the scorecard.

Makes me look at, why did that take so long? And then I drill into the detail and I think, why is she spending nine hours on maintenance when it's really easy? Yeah, over a week, nine hours a week.

I find out she's not logging it properly. And now I've told her what she needs to do, log that as an issue. And I'll be checking in on the next month to make sure that's resolved.

And this is how you just keep... None of these things take long to do. They take a couple of minutes, but it sounds like a lot of work when I'm just talking about it.

Yeah. Anyone else got any other questions?

[Attendee 4] (58:02 - 58:02)

Thanks, Rachel.

[Rachael Davis] (58:02 - 58:28)

It's all right. Thanks, Gabby. Anyone else got any other questions or are we done?

Are you all good? Shall I put a thumbs up? I'm going to stop this share.

Let's make sure everybody's all right. Is there anything else that I missed out that anybody wanted me to talk about? Are you all all right?

Jasmine, you look like you really want to ask me something. Oh, no, sorry.

[Attendee 2] (58:29 - 58:40)

Are you multitasking? I'm thinking. I'm thinking because...

No, I'm just... I'm thinking how you put it into practice. I think that's the tricky bit, isn't it?

[Rachael Davis] (58:40 - 59:41)

Let's just quickly talk about that because you're absolutely right. All this sounds magnificent, doesn't it? But how do I do this in practice?

So with SES, if you're worried about it, I would set aside a 30-minute video call with your virtual assistant on a Monday. And what I suggest they do on a Wednesday is they send you a little progress report on how many tasks they've completed up until that point, what they've done, have they hit the priorities you've set them and what they're expecting to do for the rest of the week. Also, they can highlight at that point what help they need from you on a Wednesday.

What help do they need from you in order to get things done? I have got a list of four things my virtual assistant needs from me today in order to help her finish the week. Four things I'm really behind because we've had bank holiday and I've not been doing any work.

And I've got that clarity because it comes off our mid-week checking. And then on a Friday, you don't need her to have a video call. You just need her to sign off and say, I did the 10 tasks that were asked of me this week.

[Attendee 2] (59:42 - 1:00:01)

Yeah, that makes complete sense. I struggle because it's not just assistant. So I've got people working on accounts and things and it's harder to, it's not just a task that you can tick off if you say it is.

[Attendee 3] (1:00:02 - 1:00:03)

Is that because it's ongoing?

[Attendee 2] (1:00:03 - 1:00:25)

It's because it's ongoing. And you're reliant on clients providing information. So a lot of the time you can, not fobbed off is the wrong word, but you can be, you know, it can be explained away, extra time and extra things taking longer than I would think.

[Rachael Davis] (1:00:25 - 1:00:26)

Yeah, yeah, than you would hope.

[Attendee 2] (1:00:26 - 1:00:38)

Yeah, that's- Then I would, yeah. And it's just, that's, I think where I'm, because I've set the goals and I've set the KPIs, but if somebody's got good excuses. Yeah, right.

[Rachael Davis] (1:00:38 - 1:01:28)

So I think at that point- Yeah, do you know what I would do there? You know what I've got on mine? I've got waiting on approval or you could call that ongoing project.

You could give it a name, but if, then you need some visibility in how often that's happening and how long these things take. That's true. I think if you had a bit of visibility, you could still do your week.

I understand when it's ongoing and it's not got an end, a start and an end, it's hard. But then some tasks will always move over to the following week, but you just pick them up and you soak them up through those weekly check-ins. Yeah.

So I would say that what you need to do in that circumstance is have a list that's very clear what's- Yeah. With a date on it, how long it's sat there for. So you can see- Yeah, that's a good point.

Actually, this has taken two weeks for you to sort out. There's got to be something going on here that you're not doing.

[Attendee 4] (1:01:28 - 1:01:28)

Yeah.

[Rachael Davis] (1:01:29 - 1:01:48)

You're not chasing the client long or you're not speaking to them frequently enough to get this work finished. And then just make sure you have some clarity around what goes on that list and the date that's on it. So the date that they finish their piece and then you've got to see how long it's gone on for.

So I think you need a pipeline- Clarity there. I think you're right.

[Attendee 2] (1:01:48 - 1:01:50)

Yeah. Yeah, I think that's it.

[Rachael Davis] (1:01:50 - 1:01:54)

Because you can see how good we are at closing work off. Yeah, that's what that is. Yeah.

[Attendee 2] (1:01:54 - 1:02:14)

Yeah, that's it. I think that's what it is. And I think where I've kind of avoided the regular weekly check-ins just because it seemed very micromanaging.

Yeah. Yeah. It seemed like I was micromanaging.

I think in some cases it may be the way to go.

[Rachael Davis] (1:02:14 - 1:02:54)

Yeah. The other thing you can do is you don't need to have a call with them. If you would like just an update from them, then you can have that.

Yeah. They are required to give you something because otherwise things stay on the list forever and then they never get- That's it. Accountability to get this stuff done right.

So if they do have to talk to you and tell you that it's delayed again, that's accountability, isn't it? That they're not achieving. And then you could maybe introduce a rule that says nothing can go on longer than four weeks.

Like give it- Yeah. Yeah? Yeah.

And then if they're not reaching that, it's a performance management. And you've just got to get braver at having the difficult conversations. Yeah?

[Attendee 2] (1:02:54 - 1:03:04)

Yeah. Yeah. That's probably what you need to do.

Yeah. No, I think that's what it is. I think, you know, I kind of judge people by how I would do it, how I work.

[Rachael Davis] (1:03:05 - 1:03:46)

Yeah. Yeah. You just need to become more of a manager now in terms of instead of just allowing it to happen, have a cut off period, have some visibility on how long it's been on.

You guys have been waiting for the information to come back to you. And then have those conversations off the back of that, you know, this is taking too long. It can't carry on.

You need to change this. You know, however you want to have that frame, that conversation, then do. And is anyone else got any other questions?

Because I know lots of people left because it was slightly over. I think everyone's good. But yeah, just get a bit braver.

Jasmine, this is it. It's playing to your dynamic, isn't it? Your wealth dynamic.

It is for you. But finally- Oh, yeah.

[Attendee 2] (1:03:47 - 1:03:51)

No, you have to do it. But yeah, I thought there might be another way.

[Rachael Davis] (1:03:51 - 1:05:45)

I think at the end of the day, this is accountability. And you have to, they have to be aware of when they're performing well and when they're not. And what steps need to be taken.

But you also have to be aware as a manager that sometimes it's your fault that they're not performing because you're holding them up or someone else in the team is holding them up. Or the process wasn't good enough. And once you've got past all of that, then it's performance management.

Yeah. You need to be on that. I'll get on the case.

Difficult conversations. Yeah. Well, listen, I hope you all got something value from that.

Everyone's got different levels of experience. It's just from the people who've just got a virtual assistant to the people who've got like grant, who've got teams of people and are using automation to really help them. But play to your dynamic.

Get the automation if you need it. Start thinking about the difficult conversations if you're not naturally, you don't naturally enjoy them. I don't think any manager enjoys a difficult conversation.

But once you start having them more regularly, you'll find that you're fixing smaller problems and that they're not so big and actually it's easier to pick out the difficult stuff, the small difficult stuff than the bigger difficult stuff. And you'll find that the conversations flow a lot better. And it gives them the opportunity to tell you when you're not being very good at your job.

And then they feel better about it because they're allowed to tell you as well. So just take that, you know, take it on board, learn from it. And then they feel like there's some kind of two-way feedback conversation going on.

It just makes the environment for talking about mistakes and problems more easy. But, you know, you catch them before they become emergencies. It's a much easier conversation.

I love the way Smitha has gone on this with her otter. So I don't know if you can hear. She's just recording it.

Look at that bit of automation. It's brilliant. Well, listen, have lovely lunches all of you.

I hope Smitha found that useful. I'll speak to you all very soon. Yeah.

[Attendee 2] (1:05:45 - 1:05:46)

Thanks, Rachel.

[Rachael Davis] (1:05:46 - 1:06:14)

Bye, everybody. Bye. Thanks, bye.

Bye-bye. Bye, guys. Lauren, it's finished.

I don't know whether you're here. So I'll leave you to your lovely lunch. And Smitha, thanks for otter.

I accepted it. Hopefully it recorded it. And I'll see you all later.

Bye.