

# BUbusiness Management Bootcamp

## Module 4: Outsourcing Like a Rockin' CEO



In this module, we will take a good, clear look at a third alternative to setting up and using many new systems all by yourself and spending all your time on learning curves: **Outsourcing your business tasks and functions**—and you can do this with as many parts and systems or as few as you need to. Combine outsourcing system and software set-up, to save time and eliminate set-up mistakes and/or outsource regular, monthly tasks too, on an ongoing basis.

### STEP ONE: CONTRACT WITH A VA

Your simplest solution and a great introduction to the wonderful world of outsourcing: Hire a savvy Virtual Assistant who has experience in the systems you need her to set up (many VAs specialize in more than one system and area of expertise). You don't need to hire her like a 'regular employee': She is an independent service provider like yourself, and she will be responsible for her own taxes, sub-contractors and availability.

Furthermore, most VAs will offer blocks of time you can book on a regular monthly retainer—as little or as much time as you like.

Furthermore, most VAs will offer blocks of time you can book on a regular monthly retainer—as little or as much time as you like.

Of course, you then have to know how to communicate what you need done and how you would like to receive it. This involves setting deadlines and creating and providing To Do lists for your VA.

One huge mistake to avoid: Not knowing the first thing about what you need or why you chose a system to install, and expecting your VA to read your mind and run your business for you without giving her clear direction. There are many, many tasks a VA can do, and you first need to make sure that:

- You let her know which specific tasks you need and expect her to do
- You find out which tasks need to be done before you contact her

Another mistake: Hiring a VA who is not a good fit for the level you are at now. You would not want to hire a VA used to working with a full, top-level team at a breakneck pace, when you are just getting your toes wet with outsourcing and starting or upgrading your business. Your VA should never outgun you by miles; though being ahead in her area of specialty is expected.

You can set things up properly and make sure you're hiring the right one in your hiring interview—whether that's a quick conversation or a long formal interview.

## **STEP TWO: THE HIRING INTERVIEW AND PROCESS**

First thing to get straight: It's not really a “hiring” interview. You are checking out an independent, short-term, freelance contractor to make sure she is your best ‘pick’.

Before you ever get to the interview stage, however, check out any references you can find.

Start by checking any testimonials on her website, making sure that the links lead to real, legitimate websites.

Then Google her (name and title). See what appears in the Search results.

Particularly look for informal feedback about her services—comments in blog articles such as quotes she has given, or someone thanking her for help.

Look for clues about the level she prefers to work with.

This may be easier than you think. Many VAs include statements headed with something like “Who Should Not Work with Me”. If they do, they will state their preferences straight out. If a VA does this and it is obvious she is the wrong mix for you, she has done you both a favor!

On the opposite side of the coin, be sure to check out the “Who SHOULD Work with Me” information that she has probably also included.

Finally, check out her website to see if she offers blocks of times that suit your budget, or hourly rates you can handle. Calculate:

- What tasks you want her to take over or help you with
- How many hours per month you can afford to pay for
- Time zone compatibility (you don't want to be getting up at 2a.m. to phone her!)

- Time zone compatibility (you don't want to be getting up at 2a.m. to phone her!)
- Whether or not paying her XX dollars per hour will make you money or lose it.

Example: If you pay her \$60 dollars and hour but the five hours she works frees you up to see five clients at \$250 per hour, then it's a no-brainer!

On the other hand, if you haven't yet lined up clients, hiring a VA for thirty hours a week is not a cost effective move and will lose you money—unless you are hiring her strictly for one-time set up of something like your shopping cart or website.

When you contact your preferred candidates, have ready a list of topics you want to discuss. Include:

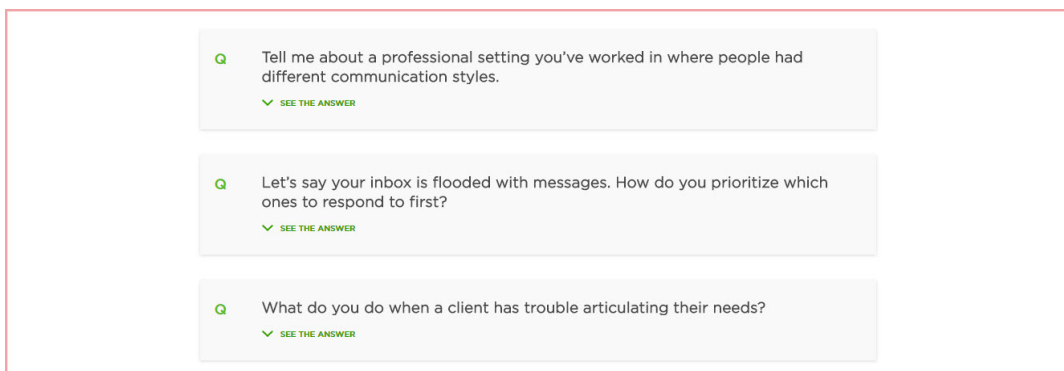
- Whether or not this is a one-time set up commission or you wish to retain a regular block of time each month
- How and when you will both best communicate (email? Text? Telephone?)
- If she or you will supply a contract or client agreement
- How and when you will track deadlines or she will report progress
- What specific tasks or responsibilities you want her to take on—and to what degree
- Whether or not she will be able to grow with your business
- Compatibility

You need to let her know how you work and check that she is comfortable with your style and personality type—and you with hers.

Decide in advance what you need from your VA: Not just in skill set, but also in personality and work rhythm. If you are the sort of person who likes to be chatty, consider whether or not you will be comfortable with a VA who sticks strictly to business and might feel irritated with your slower, more informal approach (or vice versa).

Or do you really need someone whose personality and style is, in fact, different from yours?

If you're nervous about exactly what to ask her during an interview, and how to ask it, check out Upwork's handy "template" article, [Ten 10 Virtual Assistant Interview Questions and Answers](#).



The image shows a screenshot of three interview questions from an article, each with a 'SEE THE ANSWER' link. The questions are:

- Q Tell me about a professional setting you've worked in where people had different communication styles.  
✓ SEE THE ANSWER
- Q Let's say your inbox is flooded with messages. How do you prioritize which ones to respond to first?  
✓ SEE THE ANSWER
- Q What do you do when a client has trouble articulating their needs?  
✓ SEE THE ANSWER

## STEP THREE: WHERE TO FIND THE BEST CONTRACTORS

When it comes to finding the right contractors for your business setup and/or maintenance, ask for or look for **personal recommendations** from your peers, interview likely candidates — and **check out all references and testimonials**.

Another option: Freelance job boards such as:

- [VANetworking](#)
- [Upwork](#)
- [Fiverr](#)

Boards like this typically operate by asking for payment, which they hold in escrow for you until you have signed off on the job. You will be able to specify jobs you want people to bid on, in some boards. All of them allow you to view the person's profile, see their rating, their availability, feedback and turn-around time, so pay careful attention to these areas before hiring.

Try a contractor from a board out on a smaller project before committing to working with them on a more regular basis.

And be aware that the less you pay, the more likely you are to have typical “starter outsource woes” such as the contractor turning in sloppy work, or work with errors. You also may end up re-doing a task or paying for someone else to ‘fix’ it or redo it.

So, do your due diligence, and consider how much freedom from a task is worth to you.

Or you can save yourself heartache, aggravation and time, and go with this top outsourcing shortcut:

- Melissa Ingold’s [Fabulous Contractors List](#), which you can find at her [Time Freedom Business Academy](#) .



Melissa Ingold has built up a seven-figure business by outsourcing, and she is regarded as one of the top experts in teaching effective outsourcing and contractor management.

Melissa Ingold has built up a seven figure business by outsourcing, and she is regarded as one of the top experts in teaching effective outsourcing and contractor management.

Her Fabulous Contractors List provides contact information for over one hundred high-end contractors—many of them personally used by Melissa and all of them well-recommended. Any time you need a reliable, proven contractor who can save you money with maximum efficiency, just turn to your copy of the list!

## **STEP FOUR: MANAGING YOUR CONTRACTORS**

If what to tell your contractor and how to make the most of her time has you in a cold sweat, consider a [Time Freedom Business Academy](#) membership, which will allow you to manage your contractors like a pro.

As Melissa Ingold points out:

- YOU still have to be the leader and call the shots
- YOU still have to create the ‘To Do’ lists
- YOU still have to come up with the marketing plan

Except that with Time Freedom Business Academy... you don’t. That’s done for you!

Oh, you still supply the actual instruction and ‘To Do’ lists, and you still decide on your marketing plan... but it is Time Freedom Business Academy that actually provides the right ‘To Do’ list at the right time, for the right task—and provides you with a complete, nothing-missed marketing plan for your contractor to effortlessly put in motion, using her expertise.

What that does is make you look like a pro while ensuring that you don’t waste a minute of your contractor’s precious time (or yours). You also won’t be paying for her time as she waits for you to scramble around, trying to figure out what you want her to do.

### **How it Works:**

Every month you get an easy, completely done-for-you “marketing to do list” to hand off to your assistant each and every month so she can market your business for you—which will give you more time to do what you love.

You’ll know exactly what tasks to ask your contractor to do. You’ll ask her to do them at the right time. And you’ll know you’re getting great value from what you pay her—and she’s getting the satisfaction of a client who is professional and easy to work with.

Items included in your monthly kit, which is a complete marketing plan in itself:

- That particular month’s cohesive, necessary project
- Templates for it
- Checklists
- Task-tracking calendar
- Swipe files
- ‘To-Do’ lists for that specific marketing launch

- 'To-Do' lists for that specific marketing launch


A Time Freedom Business Academy subscription also provides you with other invaluable resources, such as access to:

- **A library of project kits** you can hand off to your assistant
- **A Standard Operating Procedures Guide and Template** (to help you create documents like a pro)
- **Training audios**
- **A Business Operations Manual Template**


A business Operations Manual is a 'must-have' piece of documentation that you can use to teach your new project manager, operations manager, or executive assistant about your business.

It should provide key information on what your company is all about. It should provide templates and style guides for all your processes and systems, as well as give your VA or project manager an instant overview of your business processes, mission and goals.

Even if you don't join the Academy, do be aware that the Time Freedom Business [website](#) is an absolute goldmine on almost everything you need to know about successful outsourcing, sharing blog posts on outsourcing topics, tips on frugal outsourcing, tips on hiring and working with contractors, outsourcing FAQs and videos, and more.



**How Much Does a Virtual Assistant Cost?**  
"I want to hire help, but I have no idea how much a virtual assistant should cost me?" There's a common misconception that outsourcing your business costs money. The truth is exactly the opposite, though. Outsourcing can actually make you money.. If you do it..  
[CONTINUE READING >](#)



**The Outsourcing Rule That Changes Everything**  
The rule?  
Well, it's simple, really.  
BEFORE you outsource any business task, you first need to:  
[CONTINUE READING >](#)

**BLOG CATEGORIES**

- Featured
- Free Gifts
- Frugal Outsourcing
- Hiring & Working With Contractors
- Melissa's Thoughts
- Outsourcing FAQ's
- Outsourcing Videos
- Outsourcing Your Business
- Productivity & Outsourcing
- Time Freedom
- Tools for Saving Time

This is your first 'go-to' stop, if you're brand new to outsourcing.

## STEP FIVE: CONNECTION AND COMMUNICATION

One of the best ways to connect with your contractors is through project management software.

This software doesn't have to be complex or expensive: It just has to fit your business level, contractors and needs.

For example, if you are jumping into passive income creation, courses and heavy content for a monthly membership club, as well as doing public speaking and organizing seminars, webinars and VIP days, you'll likely have an entire team of contractors to help you cover all the necessities of making this type of business run like clockwork.

One strategy that would help, in this type of business scenario: Hire an experienced Project Manager who can coordinate all these different facets and contractors, to ensure everyone meets your deadlines and no one is waiting for anyone else.

In that case, you'd want a robust project management system like [IDoneThis](#) or [Basecamp](#) to help you.





Basecamp is fully customizable. You can brand it, allow specific team members to access certain parts, and operate it from your mobile devices too. (And there's a free trial).

If it's just you and one VA, however, you can keep things much simpler. Some scheduling software provides options to check in and leave notes. Simple 'To Do' programs such as [Eynote](#) also allows you to share information with team members.

## STEP SIX: CONTRACTS

The one thing above all others you absolutely must do, if you are planning to outsource: Use a contract for each contractor.

Contracts are your friends—and they are good friends to your contractor too.

Contracts:

- Eliminate confusion, assumptions and misconceptions
- Provide a quick and definitive reference on how things are done for your company
- Outline each parties rights and responsibilities
- Provide information on and take care of important topics like confidentiality agreements and payment details and arrangements
- Provide legal protection for both parties
- Eliminate potential for confusion
- Reduce inefficiency and mistakes

So make sure you do use them. Don't be shy about it! After all, you're entrusting another person to care for your business as much as you do... and that person trusts you to treat her fairly and provide her with everything she needs to do the job well.

**Types of contracts, forms or agreements to consider:**

- **Client confidentiality** agreements
- **Non-disclosure** agreements
- **Non-competition** agreements

You'll find an excellent section on contracts in lawyer Lisa Fraley's book, [Easy Legal Steps that are also good for your soul](#) – as well as access to bonuses that make this an even more rich resource.

[Rocket Lawyer](#) also provides online contract help: You can ask a legal question or have a form created inexpensively.

But whatever you do, make sure you are legally protected—and do use contracts and

form created membership.

But whatever you do, make sure you are legally protected—and do use contracts and forms that ensure this.

## **STEP SEVEN: WHAT TO OUTSOURCE**

We talked about project managers and VAs, but here's a quick list of other roles and positions within your business to consider outsourcing:

- Email and autoresponder set up and/or handling expert
- Content or copywriter
- Marketing strategist (campaign manager)
- Customer support
- Help Desk expert
- Technical support
- Website design and/or maintenance
- Graphic design
- Platform specialists
- Audio/video technology/platform specialists
- PR and promotion manager
- Affiliate manager
- Advertising manager or assistant

And that's just a few.

There are many different facets to running an online business. What do you want to do, and what do you not want to do?

If you want to answer your own emails, then you can be your own customer support. If you're not selling a lot of products online, then you may be able to do that, if it is just offering private support for your coaching clients: But only you can decide if this is an integral part of what makes your business special... or if answering your own mail and providing customer support is something that loses you money and drains your energy.

(Another way to decide what to outsource: If a task or specific area of your business energizes you, do it. If it drains your energy or you find yourself procrastinating, outsource it!)

If you are selling a lot of digital courses, you may run into more tech issues and need a tech or website maintenance support so that you're not handling everything.

You also may just find it helpful to have an assistant to take care of tasks that can be automated around a function like running webinars: For example, she is the one who checks the equipment for you, presses the 'Record' button and makes sure your webinar is recording, sends the finished webinar recording out for transcription, et cetera. All the stuff that doesn't really need your personal attention, but that needs to be done in a timely, efficient way.

## **STEP EIGHT: MANAGING A TEAM**

We've already talked about project management software and strategies for managing a full team.



We've already talked about project management software and strategies for managing a full team.

Other things to consider: If you run a team, you need to delegate different email addresses to the different roles on your team so that they're not using their personal email addresses. Examples: Support@YourName.com, TechSupport@YourName.com, Info@, Team@, YourName@.

Think about all these email addresses, and how you can fill the roles.

You need also need a description for each role, outlining what role each contractor is filling, demonstrating how that plays in the bigger picture of your business, what you expect them to take care of, and how this fits in with making your business run in an efficient and fluid manner.

Always ask yourself if it's worth it for outsourcing. If it will take you many hours to create a design, or design a sales page, it's not your gift, so never be afraid to outsource what's not your gift. Hire a professional for a couple of hours, and a couple of hundred dollars, to get what needs to get done, so that gets taken off your plate, things get accomplished, things are moving forward, and you get to coach more and do what you do best.

Always ask for time sheets, if your contractor is working by the hour and not quoting you a per-project price. Track their time anyway, so that you have a better idea on what sort of time frame you need to allow in future for maximum efficiency.

Help your team to work as efficiently as possible, so that they too feel energized and productive (rather than stressed and rushed) and it does not cost you more money than necessary.

Reevaluate how your current team is working, and make necessary adjustments, taking a solutions-oriented, no-blame approach when you run into problems.

Your level of success will ultimately have a lot to do with how well you make use of outsourcing. Once your systems are in place and you have people to support you in your business, your business will thrive. Don't be afraid to hire the experts and the support staff that you need.

Finally, get organized! Add all the pieces you've worked out to a detailed Word Doc or Excel Spreadsheet and keep a master business plan for your outsourcing, creating a record for each contractor including:

- Business Description (what they do)
- Hours + Availability
- Role within the team
- Reports to
- Schedule
- Payment details
- Notes
- Team Role

- Notes
- Team Role
- Systems Used
- Contact Info
- Goal Setting
- Goal Review

Finally, make sure you plan your outsourcing strategy and ideal team now—even if you can't yet afford to outsource on a regular basis.

Dig deeper and you'll find that all the top celebrities in your niche get there with the assistance of a powerful and cohesive team.

**1**