Hi everyone! Deanna Maio here from 90 Days to a Profitable and Productive Team and this is Module 4: Getting the Right Start. Today's module has 3 main steps. They are: setting expectations with your brand new hire, getting your agreement signed, and setting up your training plan.

So let's jump in, shall we? First thing you want to make sure you do with your new hire is to start setting expectations upfront. And actually, you're going to start this really in the interview process, but I wanted to make sure to reference it here as well. You know you operate differently than every other client your contractor or employee has ever worked with and you need to keep that in mind. Now your team members have dealt with lots of different styles before but it’s your job, that's right- your job, to make sure expectations are being set and that they're clear. That's very, very important! This includes things like communication- when do I expect you to reply to something? How often are you available? What do we do when XYZ happens? Make sure you describe the importance of their role as it fits into the big picture, the importance of the job or assignment on the position, and the impact on the larger results of the organization. You want to make sure you give this framework straight off the bat and don't just skip straight off into the task. The reason for this is, when you give a framework and people have a better understanding of how their role or tasks fit into the bigger picture, they're often able to make suggestions or problem solve without direct input from you because they further understand what's before, after and around their particular task.

You also want to make sure that when you set expectations you're prioritizing major tasks and activities and ranking them in order of importance. That way, people can better understand what to do when they have conflicting demands. Let me give you an example- let's say you're planning for a launch that's going to start in 2 weeks but I also have a regular report that I do for you related to our easing open rate and click the rate. When it comes down to it, the launch is probably going to be more important because it’s more time driven. When I have priorities in order as your team member, I can make decisions without direction or input from you to better impact the organization when I have conflicting priorities. Also, during this stage, you want to establish procedures. If you don't have procedures in place already, like standard operating procedure or SSOPs, you want to make sure as you're doing training with your new team member you are documenting, either through video, audio or written procedures or pictures, what to do and in what order, to accomplish a particular task or project.

You want to make sure you're setting reasonable time frames for each of these items and that you're clear on when they can make decisions related to each piece. Sometimes those are called 'Policies'. So let's say there's a procedure for processing a refund, but you want to add in some thinking or decision making so that on a certain level of refunds, like a refund under $100, they can do without any interaction from you. You want to make sure you establish that decision making process or policy as quickly as you can from the beginning and again, this keeps them from having to come back to you and ask endless questions on a case by case basis.

Make sure you decide on a preferred method of communication with your contractor or team members as well- what methods you'll use for that communication, when, and how often. If you're using a project management tool like we recommend here at Delegated to Done, it’s often going to be through that project or task management tool that communication happens or you might want to specify something else. Like with my team, I let them know if they aren't going to be able to make it to something that was previously scheduled, they should use any means possible- telephone, email and text message- to let me know and it won't be a bother to me because I'd rather have them contact me 3 ways and me get it, than them to only use email which I might not have open.

So make sure you decide on the protocol and clarify that upfront. You also want to make sure you're setting measurable criteria for each role to let them know what it is they should be working towards in each part of their role. Be very specific and make sure you include deadlines as well as quantities. So maybe I'm supposed to complete a report for you every month… when should I have it to you by? Who can I reach out to for input? Where would you like it to be delivered? Is it by email, through the project management system, uploaded to Dropbox, etc.? How will I know what success looks like? That's really what this slide should be recalled.

You also want to make sure you have an agreement with your team member. Straight off the bat your freelancer may have an agreement that he or she may sign but if not, you should draw up a formal agreement. Now we even included an example agreement for you in your tool kit but you want to make sure that you review it, make any edits, and I definitely do recommend you run it by your attorney. When you have an agreement in place, you'll eliminate assumptions and expectations that are unclear on both sides. Then you've also got a reference point. So if something comes up you can say “oh yes, we did put that into the agreement.” In some cases, there are going to be things that come up that you don't have in the agreement. So some things you want to make sure you include are the scope of the project or task, how they're going to be paid, and deadlines. You want it to be in writing and signed by both of you and any expectations that come up outside of a formal agreement, you want to make sure you talk about as quickly as you can and put them in writing and in most cases, that’s fine for something like that. When you have an agreement in place, you're definitely going to avoid micromanaging your freelancer. Make sure you don't tell them how exactly you need to do the role but the results that you want in the end and if you're happy with the result, it doesn't really matter how they go to it. Of course the exception of that is if they're getting paid hourly and if the time you're being billed for seems larger than it should. In that case, ask questions. Or you can initially set time frames for tasks and say no more than 2 hours and then see where you get to and if it needs more time, then it needs more time.

Last piece in the ‘Getting a Great Start’ Module is on setting up your training plan and it’s actually really, really simple... Start by reviewing the list of responsibilities or tasks and projects in the job posting. Then prioritize what they must learn first, second, third, and so on. Then, make sure you add a note to yourself on how long it’s going to take for them to get that piece trained or where they can go to find the information. Also note if there's someone else that's going to help them with that so that you can start to pull your team together or put time on your own calendar to make sure you cover those things with your team member. Don't forget, you should only be training something once. Make sure you audio record and/or video record it, have them takes notes and put together a procedure and now you can have your new employee the next time review the video or audio and the written notes and then ask questions based on that. It will require much less of your time.

So for today's module 4, we've got our sample agreement for you so you've got that ready to go with your new team member and we might even have a couple bonus goodies in there for you, you'll just have to look and see. Alright everyone until the next time, this is Deanna Maio from 90 Days to a Profitable and Productive Team. Wishing you success!