

HIRING & TRAINING

A SERVICE ADVISOR



ADAM
CMEJLA



INVESTMENT
PRECEDES RETURN,
ALWAYS

Mindset

Hiring

Training

01

MINDSET MOJO

Get yours right to hire & train well.

02

HIRE A ROCK STAR

Create a defined job description, a clear compensation plan & a personal, powered-up job posting.

03

TRAIN & COMMUNICATE

Train using a disciplined approach, invest time in your training plan & communicate!

MINDSET MAKEOVER

LEVERAGE



- Focus on energy-creating, revenue-producing activities
- Build a team that builds the business
- Experience meets efficiency

TIME



- Not enough time to...
- We're busy, time to hire another body
- Working more hours will fix the problems

VALUE



- Don't know true value of your time
- Must work / think same as me = serious breakdowns
- Investment precedes return, always

RELATIONSHIPS



- Dislike managing people
- Easier to do it myself
- Don't discuss due to discomfort

MONEY



- Don't have the money
- They don't get it; too entitled
- Carrot concept: more money = better work

A woman with long blonde hair, wearing a white, off-the-shoulder, lace-trimmed dress, is kneeling in a forest. She is gently petting the nose of a white unicorn with a single horn. The unicorn is wearing a black halter with a red stripe. The background is a dense forest with a large tree trunk on the right. The entire image has a teal-blue color overlay.

HIRING

HELP WANTED:
UNICORN

WARNING:

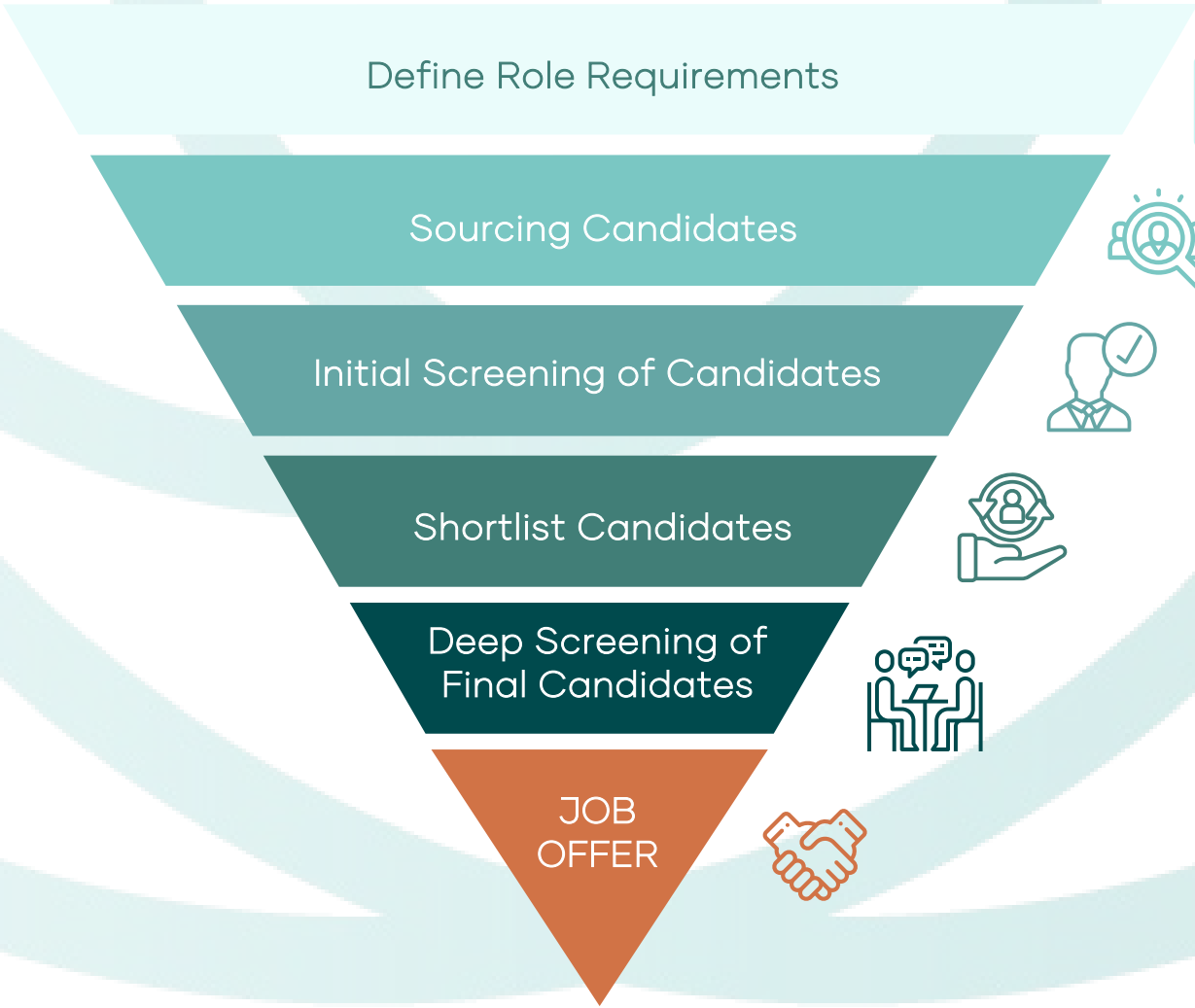
IF YOU ACT LIKE
A PRINCESS, YOU
NEED A UNICORN.

Hire one unicorn

Pay them like two people

Outperform three

THE HIRING PROCESS



THE PROCESS INCREASES THE PROBABILITY OF SUCCESS

WRITE AN EPIC AD

PRE-SCREENING

PHONE INTERVIEW

SECOND SCREENING

IN-DEPTH INTERVIEW

DEEPER SCREENING

TEAM INTERVIEW

FINAL INTERVIEW

PRESENT OFFER

1

2

3

4

5

6

7

8

9

- Job Description
- Job Posting
- Compensation

- Build and use Candidate Tracker
- Pre-screen email

- Candidate Tracker
- Phone Screen

- Candidate Tracker
- Take Profile Tool
- Complete Testing
- Complete work samples

- Candidate Tracker
- In-person or Zoom (remote)

- Candidate Tracker
- Additional work samples
- References/ Background check

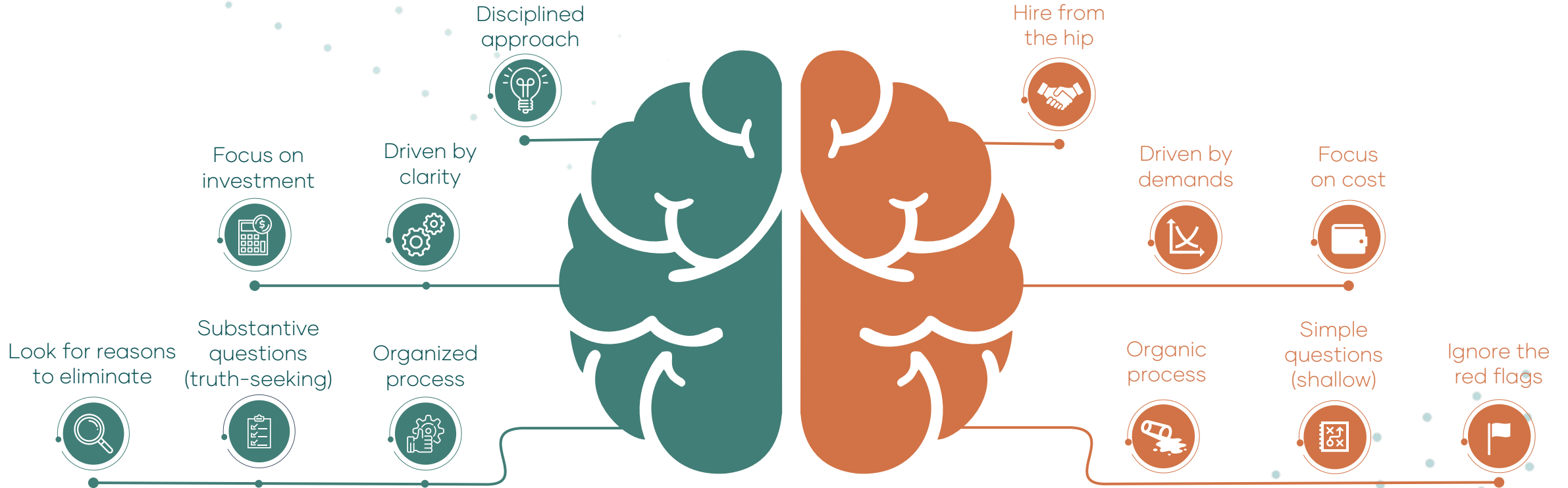
- Candidate Tracker
- Lunch Interview with team (in person)

- Candidate Tracker
- Final interview (with you)



GOOD HIRING

BAD HIRING



WAIT FOR THE H*LL YES!

HIRE "BEST AVAILABLE"

CLARITY, ALIGNMENT, ACCOUNTABILITY

It's all about creating a common language



JOB DESCRIPTION

1. What are you solving for?



JOB POSTING

2. How are you attracting the right person?



COMPENSATION

PACKAGE

3. Do you have a clear compensation philosophy?

Client Wealth Coordinator

One Sentence Description

"A detail enthusiast and implementer who loves financial planning."

Key Responsibilities:

- 1) Is accountable for superior client service
- 2) Is responsible for drafting and revising all client deliverables under the direction of the Client Wealth Planner
- 3) Is responsible for all asset movements for assigned clients to include opening of accounts and movement of funds into accounts and periodic and lump withdrawals
- 4) Contributes to firm growth by identifying opportunities to do more client work for existing client and/or gather new assets from existing clients

Detailed Responsibilities

- 1) Exemplifies the Destiny Capital values and contributes to culture
- 2) Is responsible for gathering all needed client data and data entry into Firm systems
- 3) Is the primary contact for client questions on asset movement and client data
- 4) Coordinates the implementation of client asset management with the CIO
- 5) Communicates needed meeting cadence to Scheduling lead and ensures meeting dates are met

Responsibilities to their Team

- 1) I commit to gathering all client data and assembling all financial planning and client presentation deliverables.
- 2) I commit to implementing all elements of the client's financial structure and will serve as the first point of contact for all client needs and inquiries.
- 3) I commit to supporting the Strategist and Planner in all areas of client service

Qualifications

- 1) CFP
- 2) At least two years in a client service role for a service business, ideally in financial planning

Client Service Associate Job Description Destiny Capital

We are looking for a Client Service Associate to add to the capabilities of our growing wealth management firm in Colorado.

This position comprises a number of varied responsibilities that integrate across the entire firm. The Client Service Associate will collaborate with members of the client service, marketing, operations and business keeping the office running, clients and team member client teams with account as well as providing repo supporting marketing and



Jarrod Musick, CFP® - 1st
Your Success Should Feel Satisfying!
11mo · 🌐

The Client Service Assoc and its team. There are o development are provide

As a firm, we have big ge currently serve and the cl and changing firm and performance driven, valu is looking to find a long-te

Our Values

Work With Integrity
Our values are deep-root say we will do and delive always do the same.

Collaborate As A Team
We share a common goal understand the important innovative ideas across t

Be Adaptive
We embrace flexibility, w changing industry to sup mindset of abundance th

Destiny Capital is seeking a Lead Advisor (Client Wealth Planner) to add to the talent of our growing, independent wealth management firm in Colorado. If you are a high quality CFP who is looking for a new home, see our job post today! Click here for details.

<http://ow.ly/Nu1e50Fn9wO>



7

👍 Like 💬 Comment ➔ Share ✉ Send



Cash Compensation Philosophy

Summary:

We believe that the only way to accomplish big things is with the best people demand an employer that helps make it possible for them to live their best life

We believe that total employee compensation includes things beyond the mo components. Time, agency, and self development are also highly valuable.

We focus on compensation and total employee value in the following areas:

- 1) Monetary - cash compensation for work provided
- 2) Time - flexibility and paid leave
- 3) Benefits - non-cash compensation to include professional development
- 4) Perks - employer provided events and experiences

Monetary:

- 1) **Base pay:** We seek to pay 80-95% (80% average) of median total comp form of a W2 salary to all positions. We use the best data for each pos specific where it makes sense and industry-agnostic where it makes se
- 2) **Incentive pay:** We seek to pay 20% of base pay in the form of quarterl Bonuses should be based on:
 - a) Individual performance based on position requirements, 20% c i) Meeting all position and personal development require to a 20% ii) This is not punitive. It is earned by performing standard position.

Total compensation when all bonus payments are reached shall be 100%-120 compensation.

- 3) **Partner and Strategist Supplemental:** We seek to include an advisor bu development supplemental bonus based on exceeding business develop



Non-cash Compensation Philosophy

Summary:

We believe that the only way to accomplish big things is with the best people demand an employer that helps make it possible for them to live their best life.

We believe that total employee compensation includes things beyond the monetary components. Time, agency, and self development are also highly valuable.

We focus on compensation and total employee value in the following areas:

- 1) Monetary - cash compensation for work provided
- 2) Time - flexibility and paid leave
- 3) Benefits - non-cash compensation to include professional development and insurance
- 4) Perks - employer provided events and experiences

Our approach requires **accountability, collaboration, and self motivated** team members to be effective.

Time:

- 1) Work week: The Destiny Capital standard work week is Monday - Thursday with a flex Friday.
 - a) We are providing team members with the space to manage their work and personal lives by moving to a standard four day work week. Creating the expectation that a standard work week is four days does not mean that the work output expectation is reduced by 20%, these are all still full time positions with specific requirements. We empower team members to make a decision about their own work flow on the condition that they are meeting the needs of their position and the needs of working with the rest of the team. If a team member is in a busy period, they are expected to work on a Friday or over the weekend and both of these will be necessary from time to time.
 - b) On-Call Coordinator for Friday (answers phone 8-3, can be in office or not)
 - i) On-call Strategist or Planner (answers urgent client questions within 2 hours)
- 2) Outcome based: Team members are free to end their day when needed
 - a) Ask supervisor and team beforehand, No is an OK answer

DESIGN YOUR OWN STAFFING STRATEGY

KEY RESPONSIBILITIES

STATUS, LOCATION AND HOURS

Outsource

In-house

Hours



OUTSOURCE

CONTRACTOR

VIRTUAL

EMPLOYEE HIRE

FULL-TIME

PART-TIME

EXPERIENCE AND QUALIFICATIONS

COMPENSATION PACKAGE

JOB DESCRIPTION



SCAN to VIEW

See Adam's Sample Posting Here



Desired Profile

- Takes a holistic, goals-based approach to financial planning
- Mid-career with no interest in running a firm
- Relator with good advice/RM skills
- Comfort with details and analysis
- Tech-oriented personality



Qualification

- Must be a CFP®
- Minimum 5 years experience in planning role
- Minimum 1 year experience in Lead Advisor role



Skills Required

- Skilled at drawing insights from data
- Distinctive problem solving, analytical & strategic capabilities
- Excellent time management & organizational skills

COMPENSATION PLAN

- Define Position Compensation
 - Industry Benchmarks
 - Compensation Philosophy
 - Financial Resources

- Include all forms of compensation in job posting:
 - Work location (remote is a perk)
 - Flexible hours / work schedule
 - Cash compensation + bonuses
 - Non-cash perks
 - Culture
 - Growth Opportunities



Value of your 2020 total rewards package:

EARNINGS: Current Annual Income	\$50,000.00
2020 Bonus	\$2,096.88
Your total earnings	\$52,096.88
BENEFITS: Insurance	\$5,081.58
Medical	N/A
Vision	\$123.00
Life Insurance	\$321.48
Short/Long-Term Disability	\$3,695.38
Statutory Benefits	\$1,999.92
Social Security/Medicare	\$4,387.31
Retirement	Provided for you
401(k) estimated match	\$620.00
2019 Profit Sharing Contribution	\$1,000.00
Other Company Provided Benefits	
Employee Assistance Program (EAP)	\$70,725.55
Cell Phone Reimbursement	\$3,846.15
Health & Wellness Reimbursement	\$1,923.08
Your total benefits	
Paid Time Off/Sick Leave	
Holidays	
TOTAL COMPENSATION BREAKDOWN	

YOUR 2020 TOTAL COMPENSATION PACKAGE

Individual Compensation Summary

The below is a sample individual compensation summary. Details should be customized to reflect your firm compensation policies and compensation component specific to the position. Update this form when compensation changes occur, either through promotion or as part of an annual compensation review process.

Job Title: [Insert position name]
Employee Name: [Insert supervisor]

This compensation package is only for the above-listed position and should be used for reference purposes only. It does not reflect a comprehensive description of job responsibilities and does not constitute a contract.

Base Salary: [Insert salary amount] based upon offer of employment and management review.

Performance Bonus: [Insert bonus amount], distributed annually. The amount received is based upon achievement of pre-defined goals, your individual performance in assigned quarterly objectives.

At the discretion of the firm's principals and management.

Cash Compensation Philosophy

Summary:
We believe that the only way to accomplish big things is with the best people. The best people demand an employer that helps make it possible for them to live their best life.

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- 3) Benefits - non-cash compensation to include professional development and insurance
- 4) Perks - employer provided events and experiences

Monetary:

- 1) **Base pay:** We seek to pay 80-95% (80% average) of median form of a W2 salary to all positions. We use the best data available specific where it makes sense and industry-agnostic where it makes sense.
- 2) **Performance pay:** We seek to pay 20% of base pay in the form of quarterly bonuses based on position requirements, 20% of base pay in the form of annual bonuses based on position requirements, 20% of base pay in the form of spot bonuses based on position requirements.

Non-cash Compensation Philosophy

Summary:
We believe that the only way to accomplish big things is with the best people. The best people demand an employer that helps make it possible for them to live their best life.

We focus on compensation and total employee value in the following areas:

- 1) Monetary - cash compensation for work provided
- 2) Time - flexibility and paid leave
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- 2) **On-Call Coordinator for Friday** (answers phone 8-3, can be in office)



THE JOB POSTING



Get Their Attention!



Unicorns Wanted



The Big Reveal

WHAT NOT TO DO:

We are seeking a dedicated Client Services Associate to support our financial consultants in providing excellent customer service to our clients. You will work closely with our staff, preparing documents before client meetings, organizing sales and presentation materials, compiling meeting notes, and setting up client access for new accounts.

WHAT TO DO:

We are a financial planning & wealth management firm looking for a self-driven, compassionate, and knowledgeable Financial Advisor. We are authentic, genuine, fun, and very much “non- corporate.” The image of a stockbroker, insurance agent, or Wall Street executive is about as far from who we are as one can get. Our core values align with the importance of family and work/life balance; we don’t “live to work” but rather “work to live” and, within reason, will be flexible in knowing that “life happens”; we don’t want to have our team choose between “work” and “family”—as long as the job at hand gets done.

Compensation

We believe very strongly that “you get what you pay for” in life, talent being no exception. For a highly qualified candidate with experience, we are not shy of acknowledging that and rewarding it in turn. Paid holidays & PTO (unlimited vacation begins in 3rd year), flexible work schedule, safe harbor 401(k), and professional training & development are also part of the package. Health insurance, if needed, can also be included into the comp package.

Interested candidates should send a cover letter and resume *as a PDF* along with a short video specifying what it is about this opportunity that is attractive to you. Don’t be “corporate”; let your personality come out. Email adam@integratedpwm.com indicating “Financial Advisor opening” in the subject line.

*Our office is very busy, so please do NOT try to contact our team through any method other than submitting your resume and cover letter as described above. All other attempts to reach our office will be ignored.

Sourcing Candidates



INTERVIEWS

COMPETENCE

- Skills & experience

CULTURE

- Behavioral style
- Values fit

CONTRIBUTION


- Past experience
- Value
- Engagement in interview process

COMMITMENT

- Accountability
- MOTIVATORS (for change, for work)

CLIENT-CENTRIC

- Previous examples



Top Candidate Comparison Form

Instructions: The below is used to provide a layer of objectivity when evaluating your top candidates, giving you a better indication of which candidates have the best qualities for your new hire. The form is currently set to equally weight each area, but you may choose to add additional items to measure or adjust to provide a weighting to items that are more important to your position. The results of this do not necessarily indicate which candidate to hire as your subjective input and experience of what makes someone successful in your firm are critical and important inputs into deciding if a candidate is right for the position. Additionally, you should weigh out and balance the overall +/- of each candidate as two or more candidates may have close scores but be a fit for different reasons. The tool has been populated with sample data so you can see how it functions before making any customizations.

Rating Scale: 5 = Outstanding / Highly Qualified, 4 = Excellent / Qualified, 3 = Competent / Fairly Qualified, 2 = Below average / Not Qualified, 1 = Not Qualified, 0 = N/A to candidate

	Candidate 1: Name	Notes	Candidate 2: Name	Notes	Candidate 3: Name	Notes	Candidate 4: Name	Notes
Hiring Process Feedback								
Step 2: Pre-screen	5		5		4		5	
Step 3: Initial Interview	4		4		4		4	
Step 4: 2nd Screening	3		4		3		4	
Step 5: In-Person Interview	3		5		4		3	
Step 6: Background/References	4		4		3		4	
Step 7: Team Interview	5		3		4		4	
Step 8: Final Interview	3		4		4		4	
Overall	27		29		27		27	
Average	3.9		4.1		3.9		3.9	

Knowledge, Skills and Abilities: Candidate Tracker | Top Candidate Evaluation

Interview Question Bank

The below are additional questions you can consider using in your interview process. The list is designed to be comprehensive. Remember, when designing interview questions, you should first define the skills and qualities you want to evaluate and then select questions that probe for those needs. If you know the qualities you need, a web search can be a great resource for the relevant questions.

Experience / Situation / Growth / Position Related

BACKGROUND AND EXPERIENCE / COMPETENCE

- Tell me about how your career has evolved and why you are applying for the position?
- How is your experience relevant to this job? Give me a specific example that is relevant to the work you would be doing in the role? Discuss follow-up questions / experience, tell me... etc.
- How is your experience relevant to this job? Give me a specific example that is relevant to the work you would be doing in the role? Discuss follow-up questions / experience, tell me... etc.
- What attracted you to financial services? Why? What don't you like about financial services? Describe your technical skills for financial services experience and how you would use them in this position.
- What was the most and least favorite part of your previous/current position?
- Give me an example of a time you completed a complicated task. What were the factors that made it complicated? What didn't you get the information?
- Give me an example of a time you completed a complicated task. What were the factors that made it complicated? What didn't you get the information?
- What were the factors that made it complicated? What didn't you get the information?
- What are the three biggest contributions you make in your current position?
- Do you consider yourself a technical person, a people person, or a mix of both?

CAREER PATH & GROWTH GOALS

- What do you want to get out of this job?
- How do you believe you could grow in this position in the next 6-12 months?
- Do you feel the firm's goals align with your own?
- If you were hired, what would your goals be for professional development?
- Share with me 5 goals you have previously set. If you accomplished them, what have been the rewards? How about those you have not completed?
- Share one thing in your career that you have learned the most from. What is it? How tough was it to accomplish? What is it? How tough was it to accomplish? What is it? How tough was it to accomplish?
- Share one thing in your career that you have learned the most from. What is it? How tough was it to accomplish? What is it? How tough was it to accomplish?

Interview Templates

Step 1: Write An Epic Ad
See Sample Job Post resources for examples of ads that will help you attract the right candidates.

Step 2: Pre-Screen Example - 5 Questions Sent Via Email
The pre-screen step of the process is designed to screen out the majority of who are not the right fit for your position. This is a short email that asks for the first step in demonstrating their motivation, competence, and the position. If candidates do not respond to the step correctly, do not move them forward. If you want to weed out candidates who are outside your budget early in the process, you can include a question regarding ideal compensation.

Sample:
Thank you for applying to the Client Service Associate at Firm Name. After initial review, we'd like you to move forward in our hiring process. During this next phase, our goal is to get a sense of your background and experience. Please take the time to reply to our email with your answers to the below questions.

- Who are we - what services do we provide and who are our clients? (Competence & Company)
- What is the difference between an investment manager and financial planner? (Competence & Company)
- We promised to complete a task for a client on a specific date, but it is possible we may not be able to deliver on time. How do you handle this? (Culture & Client-Centric)
- We have a client-first approach at our firm, tell me what this means to you. Give me an example of a time you saw a client-first approach in action? And a time you didn't? (Culture & Client-Centric)
- Why is your experience relevant to this job and why should we hire you? (Competence & Company)

When you reply, please change the subject of this email to: Responses for Client Service Associate and include a PDF of your cover letter and resume.

Step 3: Initial Interview - Agenda: 30-Min Phone Interview
The initial interview is a phone interview that includes 5-10 questions and should take no more than 30 minutes. During this interview, if you find that a candidate is not a good fit from the beginning, don't prolong the conversation - simply skip to the last question.

- Who are we - what services do we provide and who are our clients? (Competence & Company)
- Why is your experience relevant to this job? Give me a specific example that directly relates to the work you would be doing in the role? (Competence & Company)
- How would you describe your work style? (Culture & Client-Centric)

Candidate Tracker

Instructions: Use the chart below to track candidates who move through your hiring process. We recommend only tracking candidates who make it past the initial screening process in order to minimize the amount of time spent tracking candidates. Once you have your top 2-4 candidates, use the Top Candidate Evaluation tool to help determine who to hire.

Position: Insert Title / Year (Admin. Asst 2021 Hire)

Candidate Name	Status	Step 2: Pre-Screening	Step 3: Phone Interview	Step 4: 2nd Screening / Testing	Step 5: In-Person Interview	Step 6: Background/References	Step 7: Team Interview	Step 8: Final Interview	Offer / Position Accepted
Jane Doe	In-Person Interview Scheduled	Done 1/1	Done 1/3	Done 1/15	Scheduled				
John Smith	Completing testing / case study, due 2/5	Done 1/3	Done 1/4	In Process					Potentially has right background, but is less experienced. Need to continue process to evaluate further.
Lily Tomis	Pending decision, other candidates completing process.	Done 1/4	Done 1/5	Done 1/15	Done 1/17	Done 1/20	Scheduled		Completed initial screen as "Yes" candidate. Has the right experience, background. Evaluating actual skills and team dynamic / cultural fit.
									Top Candidate in running.



SCREENING

BEHAVIORAL PROFILES

- Disc
- Kolbe
- Strengths finder
- Myers-Briggs

SKILLS TESTING

- Basic office testing
- Position specific testing
- Software / platforms

WORK SAMPLES

- Thinking and analysis
- Written communications
- Position-specific exercises

TRAINING

A DISCIPLINED APPROACH

- New Hire Onboarding Process
- Training Plan
- Set workflows

TAKE THE TIME

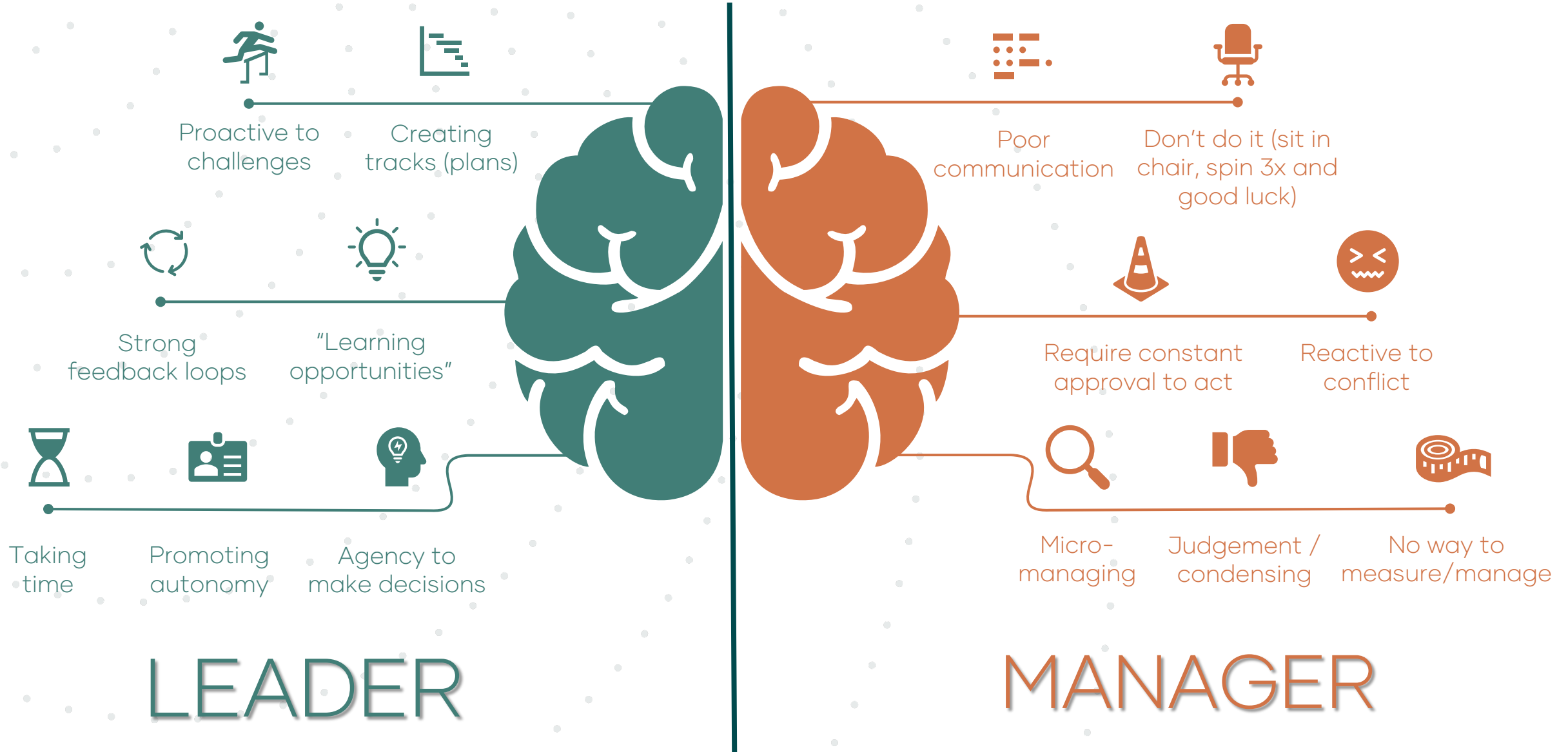
- Consistent check-ins
- Understand expectations

TALK OFTEN & OPENLY

- Candid feedback
- Permission to give feedback
- Implement suggestions



TRAINING MINDSET: THE GOOD & THE BAD



THE TRAINING PLAN

A Disciplined Approach to Onboarding

- 1 First Week: Introduction
- 2 First Month: Weekly Check-ins
- 3 First 90 Days: Monthly Check-ins
- 4 Quarterly Check-ins
- 5 1 Year Anniversary & Review

New Planner Hire - First Performance Review
Meeting Scheduled: 8/28/2019

Core Values: INTEGRITY, COLLABORATIVE, ADAPTIVE, SELF-MOTIVATED, AGENCY

Check-ins occur weekly for the first month, then every 30, 60 and 90 days. After that, date should be set for each of the following check-ins. Summary notes are to be entered, including future training items.

Training Check-Ins	Review Date
Week 1	2/1/2021
Week 2	2/8/2021
Week 3	2/15/2021
30-day	3/1/2021
60-day	4/3/2021
90-day	5/3/2021
Qtrly Check-In	8/1/2021
Qtrly Check-In	10/30/2021
Qtrly Check-In	1/28/2022

Sample: Training Plan Overview
Instructions: Use this tool to map out a training plan and timeline for new employees. This plan sets up regular check-ins to review proficiency and performance of the team member. It also maps out a template is available on the Template tab.

Name: Jim Doe
Position: Administrative Assistant
Start Date: 2/1/2021

TRAINING CHECK-IN SCHEDULE

New Employee Check-In Agenda TEMPLATE

Name: _____
Date: _____

Training Plan Review

- Review status of current training items
- Discuss your perception of training / how is it going?
- Review competency level relative to expectations at this check-in point

Summary

Insert a brief summary of performance relative to expectations at this check-in point

Key Successes

- Insert 2 - 5 areas of success here

Opportunities & Professional Development

- Insert 2 - 5 areas of opportunity or professional development goals for the upcoming period

New Employee Onboarding Checklist
Customize the below new employee onboarding checklist to reflect the process you follow in your firm.

AT LEAST 1 WEEK BEFORE START DATE

- Office / work station set up
- Technology set up
- Employment forms are ready
- Create / update new employee training plan (see Training Plan Template)
- Create / update new employee training overview (see Training Overview)

AT LEAST 2 DAYS BEFORE START DATE

- Determine initial work assignments
- Create week 1 schedule (use sample editable calendar as found in Training Plan Overview resource)
- Prepare and print orientation items
- Ensure new employee's schedule is synced with team members' availability/calendars
- Schedule weekly, 30-day, 60-day, 90-day and annual reviews with Manager
- Create job description is reflective of work that will be completed
- Collect necessary employment forms
- Ensure employee manual / policies and procedures manual is ready to share
- Firm provides overview of firm, marketing materials, etc) updated share
- Schedule 1st work training items on existing team members' calendars

FUTURE ITEMS

- Prepare and send new hire announcement
- Set up benefits enrollment

PREST WEEK

Day	Day 1	Day 2	Day 3	Day 4	Day 5
Mon	Intro & Office Space Set-up	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals
Tue	Intro & Office Space Set-up	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals
Wed	Intro & Office Space Set-up	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals
Thu	Intro & Office Space Set-up	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals
Fri	Intro & Office Space Set-up	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals	Office & Professional Goals

DAY 1

- Intro & office space set-up with team member
- Vision & Goals overview with CEO; how their position is integral to the success of the firm
- Meeting to review training plan and job description and set expectations for the role; include forms completion
- Lunch with team members / CEO
- Business Overview and Position Review; how each position is related, key processes related to services, clients, fees and team members

DAY 2

- Daily check-in with Manager, covering questions from day prior, agenda for the day, work that must be completed during training
- Position review with team members to understand related roles within the firm
- Lunch with the CEO
- General office training (phones, email, CRM system, etc.)

DAY 3

- Daily check-in with Manager, covering questions from prior day, agenda for the day, work that must be completed during training
- Position duties training, helpful related to immediate and upcoming work time

DAY 4

- Work time

CLEAR STANDARDS

COURSE OF ACTION

CONTINUOUS COMMUNICATION



TAKE THE TIME NOW SAVE THE TIME LATER

- Build a Training Plan for each position
- Allocate 1 hour a day to new hires (30 days)
- It's a one-year onboarding plan
- Take time to set the standards, clarify the course of action and continuously communicate!



COMMUNICATE

COMMUNICATE

COMMUNICATE

(talk openly and often)



LEARN MORE

- 10% Happier: How I Tamed the Voice in My Head, Reduced Stress Without Losing My Edge, and Found Self-Help That Actually Works, Dan Harris
- Extreme Ownership: How U.S. Navy SEALs Lead & Win, Jocko Willink
- Traction: Get a Grip on Your Business, Gino Wickman



ADAPT & APPLY

- Read the Hiring & Training Happy, High-Performers Guidebook and review all resources
- Identify the right staffing solution(s) for your needs
- Review Sample Job Descriptions and New Employee Resources



TAKE ACTION

- Update your organization model/staffing strategy, and draft future hires.
- Draft job description, comp plan, training plan and career ladder for each position.
- Build and use a systematic hiring process.



LIMITLESS Q&A