

ROCK STAR Right Hand



Assemble your band.

A rock band performing on stage. The lead singer is a woman with long, dark hair, wearing a black jacket over a striped shirt and black pants, pointing upwards while singing into a microphone. To her left, another woman with long, dark hair is performing a hair flip, wearing a red and black plaid shirt over a graphic t-shirt and black shorts. In the center, a man with long hair and sunglasses is playing an electric guitar, wearing a black leather jacket and dark pants. To the right, a man is playing a bass guitar, wearing a dark jacket and dark pants. In the background, a drummer is visible behind a drum set. The stage is lit with blue and purple lights, and there is a lot of smoke or fog in the air.

Hire amazing people
Pay them well
Train them right
Let them ROCK!

"I'd rather put more
time in my watch
than more gold in my
pocket."



Define your strategy & needs



Attract the right person to fill
the right role



It's a process: Nurture *into*
your rock star right hand

CLEAR YOUR HEAD SPACE

RELATIONSHIPS

TIME



- Too busy to hire, train, manage, grow
- We're out of time, hire another body

VALUE



- Don't know true value of time
- Don't value different styles/skills
- Investment precedes return, always



- Dislike managing people
- Easier to do it myself
- Avoid tough conversations & decisions

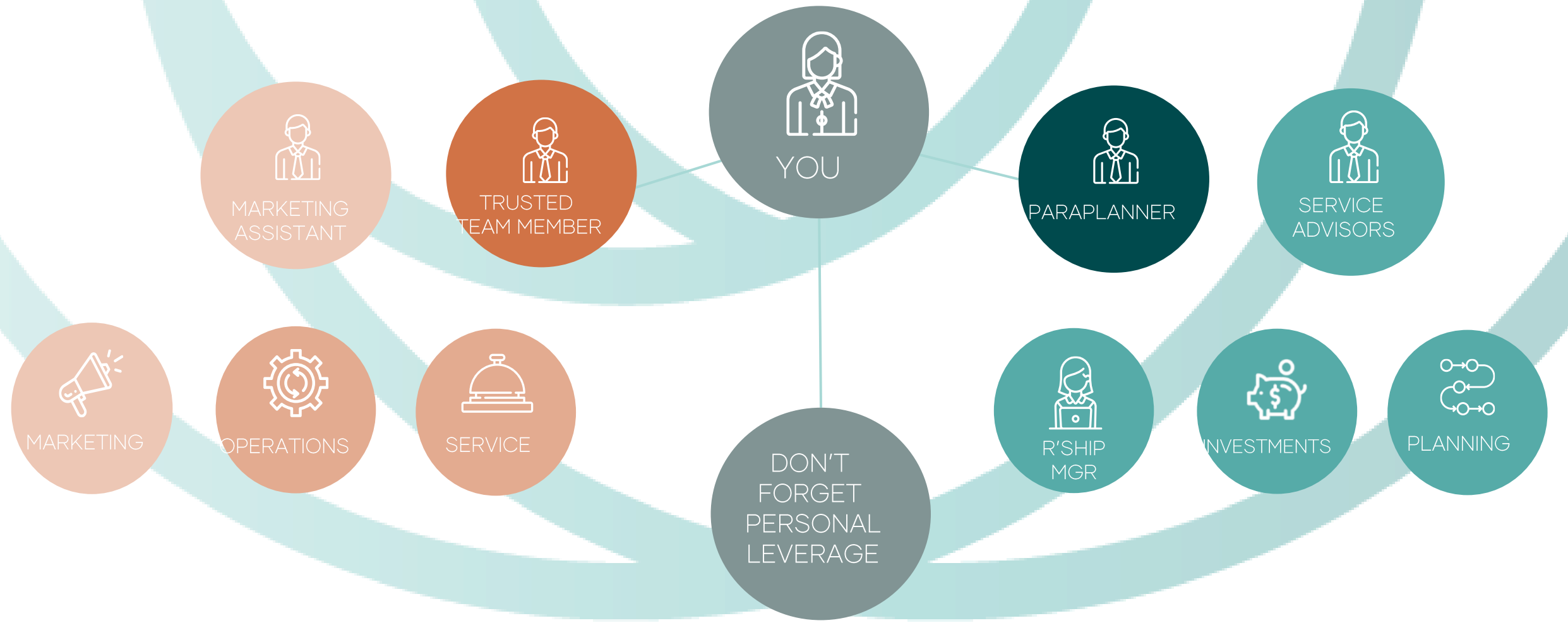
MONEY



- Don't have the money
- They don't get it; too entitled
- More money = solution

THE MODEL

CREATING LEVERAGE ACROSS PRACTICE AREAS



FOCUS YOUR ENERGY

Focus on energy-creating, revenue-producing activities



BUILD THE ROLE

It's as much about being the right person as finding the right person.

CLARIFY YOUR FOCUS

- What are your goals?
- How can I best align your time?

FOCUS YOUR TIME

- What is energy-creating and revenue-producing?
- What will it take for you to do that 80% of the time?

DEFINE YOUR NEEDS

- What type of person do you need?
- What responsibilities will they have?
- How will you support their success?



CHAT QUESTION

What are 3 energy-draining activities you can delegate?

DESIGN YOUR OWN STAFFING STRATEGY

OUTSOURCED

IN-HOUSE

HOURS



OUTSOURCE



CONTRACTOR



VIRTUAL



EMPLOYEE
HIRE



FULL-TIME



PART-TIME



ADAM & CATHY

ROCK STAR RIGHT HAND
TURNED PRACTICE MANAGER



CATHY SUTTER



ADAM CMEJLA



KYLE ANDREE
20/20 Money Producer



MITCH BAYLIS
Marketing Automation



ADAM FOUT
Content Writer



GREG WILNAU
Branding & Design

SUCCESS SPOTLIGHT

The image features an aerial view of a field with rows of young plants, overlaid with a teal gradient and a circular graphic. The text "NURTURE INTO ROCK STAR" is displayed in a white, sans-serif font, centered horizontally and split across two lines. The background is a dark teal color with a subtle pattern of concentric circles on the right side.

NURTURE INTO ROCK STAR

TAKE A DISCIPLINED APPROACH

Bad Hiring: DESPERATE

- Feeling driven by demands
 - Hiring from the hip
- Asking simple, shallow questions
 - Ignoring the red flags
- Compromising on cartwheel quality
- Focusing on cost, not investment

Good Hiring: DELIBERATE

- Feeling driven by clarity
- Following a disciplined process
- Asking the questions, then shutting the h*ll up
- No sugar-coating
- Waiting for the cartwheel candidate
- Investing in success

ATTRACTING YOUR PEOPLE

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

ACME Financial is **not your typical financial services** office environment. We have an entrepreneurial team focused on developing a culture of mutual support and organizational and personal growth. For the right person, **this is an amazing job.**

In addition to **only accepting nice people** as clients, so long as all the work is getting done, work hours are flexible and vacation/personal days are relatively frequent. As a small business owner with only one full-time employee, and two virtual specialty staff, we can only afford to hire the best.

If you are looking for a long-term job with a negotiable compensation and bonus package, industry-leading vacation policy, and a somewhat flexible schedule, please email your resume and an explanation of **what makes you the best employee** I could hire.

OUTSOURCE

CORE
STRENGTH
/ ABOVE
THE LINE

Define
Below the
Line: thin
the herd

Follow
amended
hiring
process

Task
transition
through
outsourcing

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

Jarrold Musick, CFP® - 1st
Your Success Should Feel Satisfying!
11mo · 6

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>

Our Values

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

Collaborate As A Team
We share a common goal and understand the importance of innovative ideas across the firm.

Be Adaptive
We embrace flexibility, and changing industry to support a mindset of abundance through

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 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
- 4) Perks - employer provided events and experiences

Monetary:

- 1) **Base pay:** We seek to pay 80-95% (80% average) of median total compensation form of a W2 salary to all positions. We use the best data for each position specific where it makes sense and industry agnostic where it makes sense
- 2) **Incentive pay:** We seek to pay 20% of base pay in the form of quarterly bonuses should be based on:
 - a) Individual performance based on position requirements, 20% of base pay
 - b) Meeting all position and personal development requirements to a 20%
 - c) 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 or strategist supplemental bonus based on exceeding business development

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 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



DEFINE COMPENSATION

IN-HOUSE

- ☉ Responsibility level
- ☉ Experience & qualifications
- ☉ BASE + BONUS + PROFIT SHARING

CONTRACTED

- ☉ Market rate (think \$40 an hour)
- ☉ Outsourcing: disdain factor



Remember...
if you pay
peanuts, you'll
get monkeys.

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		
Medical	.....	\$5,081.58
Dental	.....	N/A
Vision	.....	N/A
Life Insurance	.....	\$123.00
Disability	.....	\$321.48

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 reviews.

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

Profit Sharing:
Funded annually at the discretion of the firm's principals based upon available resources.

Retirement Compensation:
401k available for employee contributions with a match from the firm up to X% of the team member's annual salary.

Medical:
100% of employee's medical premium, not including dependent premiums.

Paid Time Off
15 days off annually for the first six years, accruing at 125 days per month. Team members earn five additional days in five-year increments (20 days during years 7 through 11, 25 days during years 12 through 16, and so on).

Personal and Sick Leave:
1/3 day accrues per month up to a total of six days per year and do not carry over to the next year.

Holidays:
10 paid holidays, which are determined annually.

Healthcare	.....	\$3,695.38
401k Match	.....	\$1,999.92
401k Contribution	.....	\$4,387.31
Provided Benefits		
Employee Assistance Program (EAP)	.....	Provided for you
Life Insurance	.....	\$620.00
Travel Reimbursement	.....	\$1,000.00
.....	.....	\$70,725.55
.....	.....	\$3,846.15
.....	.....	\$1,923.08

TOTAL COMPENSATION PACKAGE VALUE: \$75,094.78



See Managing Comp lesson, and/or search for "compensation" in the Learning Library!

ADMINISTRATIVE ASSISTANT COMPENSATION

Compensation Information

POSITION DESCRIPTION:

Performs secretarial and clerical duties such as typing correspondence, memoranda, reports, and meeting notes; scheduling appointments and meetings; and operating office equipment such as photocopier, facsimile, etc.

TRADITIONAL COMPENSATION INFORMATION		
Total Traditional Compensation	3rd Quartile	\$57,491
	Median	\$50,000
	1st Quartile	\$43,731
Base Salary	3rd Quartile	\$53,000
	Median	\$48,000
	1st Quartile	\$40,371
Annual Incentive	3rd Quartile	\$5,061
	Median	\$3,994
	1st Quartile	\$2,000
Commission	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A
OTHER COMPENSATION AND OWNERSHIP INCOME		
Total Income	3rd Quartile	\$57,491
	Median	\$50,000
	1st Quartile	\$43,731
Profit Distribution	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

EXECUTIVE ASSISTANT

Compensation Information

POSITION DESCRIPTION:

Supports the executives of the firm, including calendars, appointments, correspondence, and travel.

TRADITIONAL COMPENSATION INFORMATION		
Total Traditional Compensation	3rd Quartile	\$82,500
	Median	\$61,800
	1st Quartile	\$51,550
Base Salary	3rd Quartile	\$82,500
	Median	\$57,000
	1st Quartile	\$50,000

VIRTUAL ASSISTANT COMPENSATION

Assistant

- Best deal out there is freelancer, \$25-35
- U.S.-based agencies for virtual assistant hire: Belay, Boldly, Athena \$35-55

Backend

- Total Office (more backend paperwork, higher price), approx. \$75-100

Are you paying for hours vs. packages (tasks, projects, etc.)?

OFFICE MANAGER COMPENSATION

Compensation Information

POSITION DESCRIPTION:

Associate level position responsible for overall general office operations, such as internal accounting, office equipment and supplies, benefits administration, and payroll coordination. May also coordinate firm's Web site or other marketing tools. This is a catch-all function in firms that do not employ multiple staff members responsible for each of these functions.

TRADITIONAL COMPENSATION INFORMATION

Total Traditional Compensation	3rd Quartile	\$78,946
	Median	\$69,905
	1st Quartile	\$63,000
Base Salary	3rd Quartile	\$75,000
	Median	\$65,000
	1st Quartile	\$58,000
Annual Incentive	3rd Quartile	\$8,247
	Median	\$6,075
	1st Quartile	\$4,700
Commission	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

OTHER COMPENSATION AND OWNERSHIP INCOME

Total Income	3rd Quartile	\$80,502
	Median	\$70,457
	1st Quartile	\$63,000
Profit Distribution	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

CLIENT SERVICE ADMINISTRATOR COMPENSATION

Compensation Information

POSITION DESCRIPTION:

Less experienced support employee responsible for paperwork, client reports, maintaining contact with clients to provide or obtain updated information, scheduling meetings with preferred staff, and troubleshooting problems.

TRADITIONAL COMPENSATION INFORMATION

Total Traditional Compensation	3rd Quartile	\$69,785
	Median	\$61,000
	1st Quartile	\$52,395
Base Salary	3rd Quartile	\$64,425
	Median	\$57,000
	1st Quartile	\$50,000
Annual Incentive	3rd Quartile	\$7,255
	Median	\$4,500
	1st Quartile	\$2,500
Commission	3rd Quartile	N/A
	Median	N/A
	1st Quartile	N/A

OTHER COMPENSATION AND OWNERSHIP INCOME

Total Income	3rd Quartile	\$69,785
	Median	\$61,211
	1st Quartile	\$52,395
Profit Distribution	3rd Quartile	\$1,764
	Median	\$1,248
	1st Quartile	\$668

INTERVIEWS

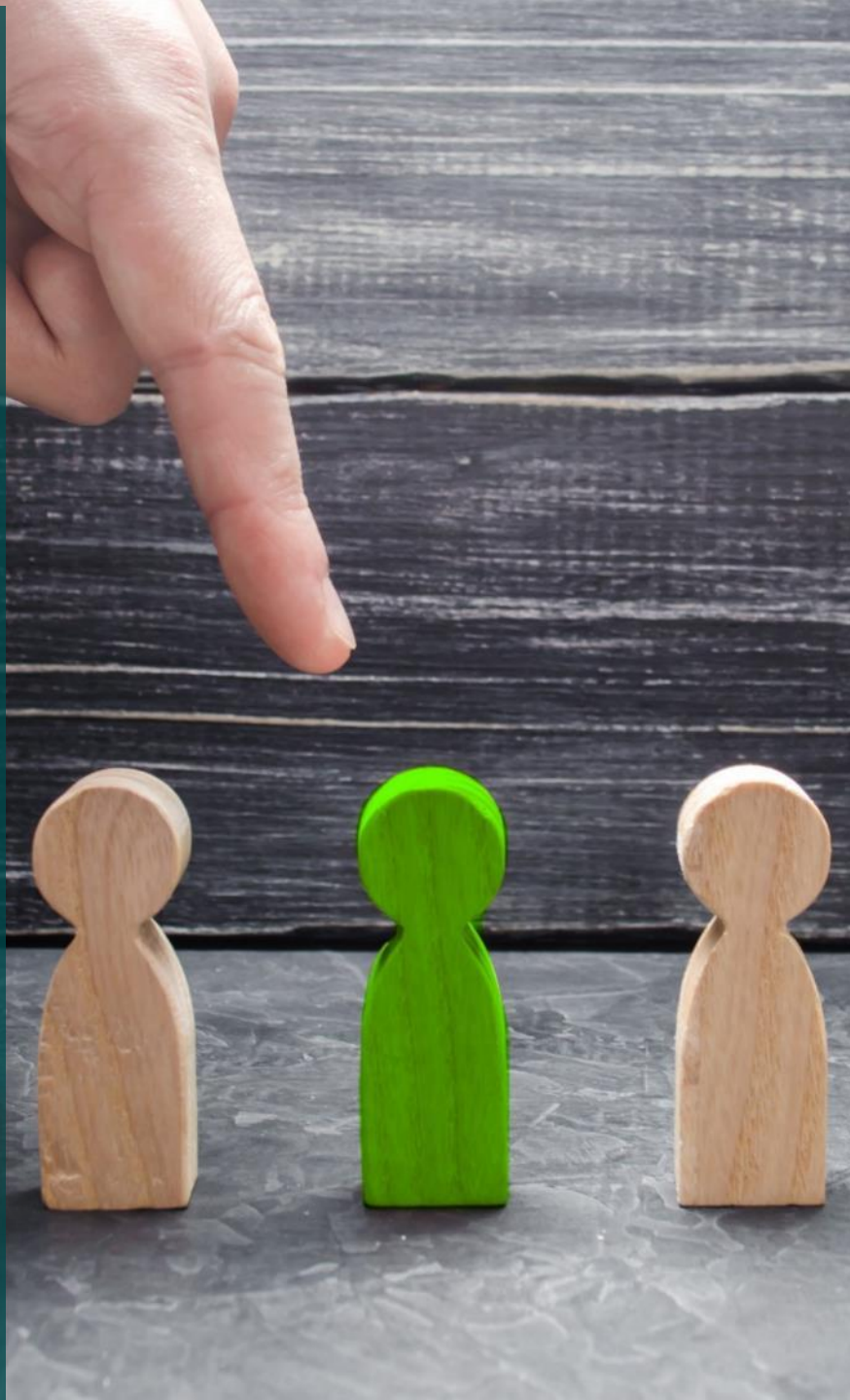
COMPETENCE

CULTURE

COMMITMENT

CONTRIBUTION

CLIENT CENTRICITY



KOLBE
DISC
DOTS
MYERS-BRIGGS

RELATED
SKILLS

POSITION-SPECIFIC
CASE STUDIES



See Hiring & Training lesson

PROFILES & TESTING

Top Candidate Comparison Form

Instructions: This tool is used to provide a clear overview of objectively rated candidates for your top 3 candidates. The tool is used to provide a clear overview of objectively rated candidates for your top 3 candidates. The tool is used to provide a clear overview of objectively rated candidates for your top 3 candidates.

Criteria	Candidate 1	Candidate 2	Candidate 3
Skills	5	4	3
Experience	4	5	3
Education	3	4	5
References	4	5	3
Availability	5	4	3
Cost	3	4	5
Overall	39	38	37

Interview Question Bank

1. What are the most important skills for this position?

2. How do you measure success in this role?

3. What are the most common challenges in this role?

4. How do you handle conflict?

5. What are the most important qualities for this position?

6. How do you stay motivated?

7. What are the most important values for this organization?

8. How do you handle change?

9. What are the most important skills for this position?

10. How do you measure success in this role?

A low-angle shot of several football players wearing helmets, looking upwards. The image is overlaid with a semi-transparent teal filter. The word "COMMUNICATE" is written in large, white, sans-serif capital letters across the center of the image. On the right side, there are several overlapping, semi-transparent white circles of varying sizes, creating a graphic design element.

COMMUNICATE

TRAINING



A DISCIPLINED APPROACH

- Use your New-Hire Onboarding Process
- Create your Training Plan
- Set workflows

TAKE THE TIME

- Establish consistent check-ins
- Understand expectations

TALK OFTEN & OPENLY

- Provide candid feedback
- Give permission to give feedback
- Implement suggestions



Take the **TIME** to Train

- Having a Training Plan creates a common language and accountability for everyone
- Allocate training time on your calendar
- Develop an onboarding schedule with weekly check-ins for the first 90 days, then quarterly for the first year
- Be clear, provide all the needed information, and communicate more than you think you should

Rock star support teams help you help them



- Involve staff in Limitless
- Make sure they have access to site
- Make sure they know they have support space in Tribe
- Encourage small-group resource sharing, community building



LEARN MORE

- *10% Happier: How I Tamed the Voice in My Head, Reduced Stress Without Losing My Edges, and Found Self-Help That Actually Works*, Dan Harris
- *Extreme Ownership: How U.S. Navy SEALs Lead and Win*, Jocko Willink
- *Traction: Get a Grip on Your Business*, Gino Wickman
- *Come Up for Air: How Teams Can Leverage Systems and Tools to Stop Drowning in Work*, Nick Sonnenberg
- The Staffing for Success Learning Path



ADAPT & APPLY

- Read the Hiring & Training Happy High-Performers Guidebook, and review all hiring resources



TAKE ACTION

- Define your strategy, process, and budget for hiring
- Prep for and launch your hire using Limitless job postings and job-description templates
- Use the Training Overview to onboard and the Training Plan Template to continually train and communicate
- Schedule training time and daily/weekly meetings



LIMITLESS Q&A