VA HIRING PROCESS

GUIDE VERSION

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GUIDE VERSION
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WELCOME

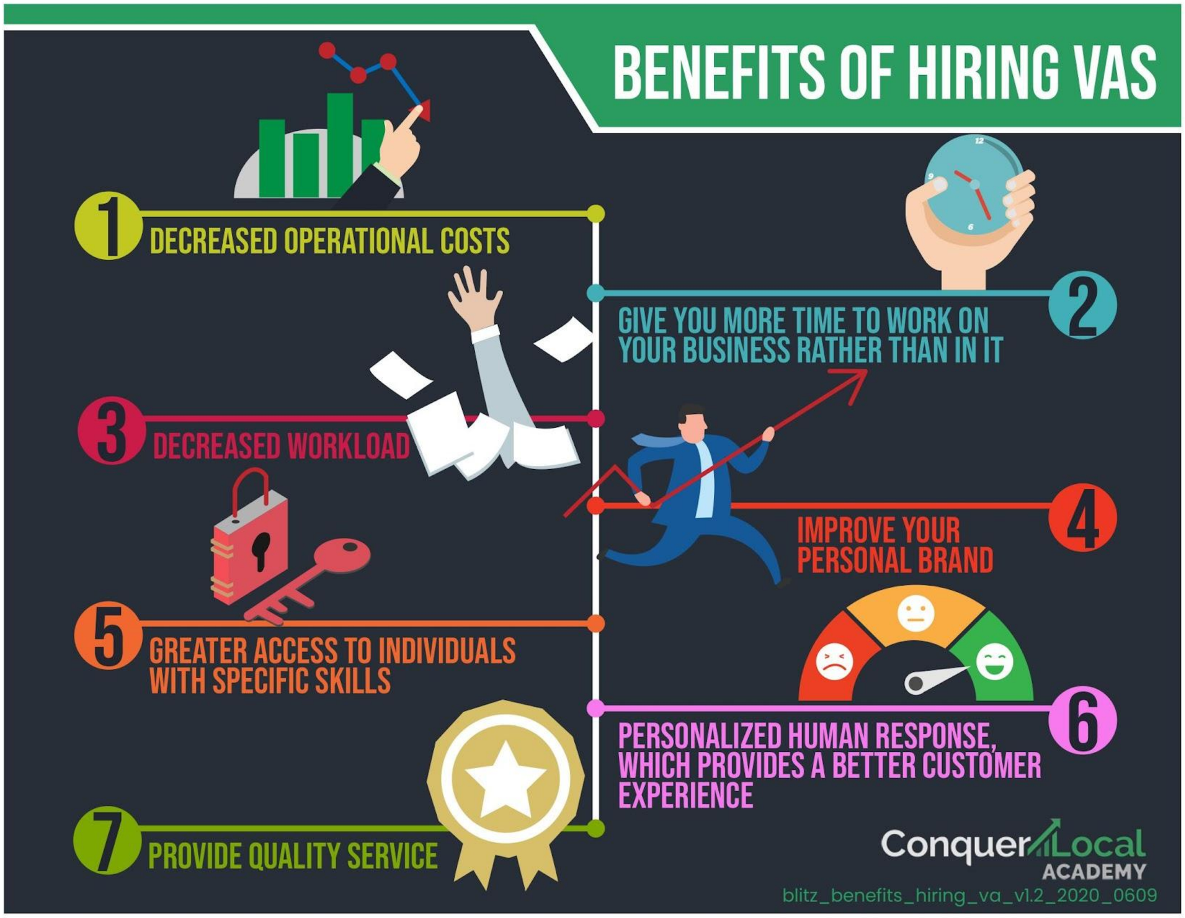
Over the past 5 years, we've hired multiple virtual assistants that have become long term team players for BlitzMetrics and assisted our partners in getting high quality virtual assistants following our proven hiring process.

We've compiled our system approach in screening and hiring virtual assistants in our VA Hiring Process. With our step by step process, you'll be guaranteed to have amazing virtual assistants for your brand and company. You will learn how we "hacked" the virtual hiring process.

With our VA Hiring Process, you'll learn the six (6) different types of virtual assistants: operations/general VAs to engineering VAs; along with the six (6) stages in hiring a virtual assistant. This includes our templates and recommended tasks you'll send over for your virtual assistant to complete.

Are you ready to hire your very own virtual team and scale your business?

Benefits of Hiring VAs



Before we start teaching you the process of how to hire an amazing virtual assistant, we'd like to tell you 8 reasons why you should actually do it.

First off are the ***decreased operational costs*** you'll have across the board. You won't need to rent out a space or buy equipment like computers or business Internet to utilize a virtual assistant's skills.

As compared to a regular employee, a VA costs way less, and you won't even have to pay for any employee benefits or pay them when they're sick. There is an understanding that if they don't work, they won't get paid.

The second reason is that virtual assistants give you more time to work on your business rather than in it. Try to think back to all the times you wasted doing menial and repetitive tasks when you could've focused on building and scaling your business instead. VAs can perform all these tasks and let you have the time to plan for your business in the future.

This also leads to the next two reasons, which are to decrease workload and improve your personal brand. As your VA works on various tasks from data entry to transcription to marketing, you'll have less work on your hands and more time for professional and personal development. How many times did you cancel a conference or workshop because you had "things" you needed to do and, on the other spectrum, how many times did you have to cancel on holidays with family and friends because "something came up" at the last minute? With a VA on your team, you won't need to stress over those "things that come up" as you can rely on them to field those "things". You'll have more time to build your connections, both professionally and personally, that will greatly improve your personal brand.

The next reason is that you'll have more access to individuals with specific skills. If you're starting your own business, you have to juggle learning multiple fields from digital marketing to website creation to graphic design. Rather than limiting your options to specialists near you, fielding VA inquiries will remove any geographical restrictions. You'll get access to competent VAs and specialists. But our experience has been that, when we have given them projects, there are competency and organizational gaps.

So we hire on an individual basis, not by team, which creates another layer of distortion. All of our people are dedicated to our mission (and to their 3x3 goals), not subcontracted out.

The US-based specialists are mainly account management, which is hard to get outside the United States. The last two reasons have more to do with dealing with your customers rather than how your business operates.

Other businesses utilize automation to field potential customers as well as respond to customer inquiries. This provides a bad taste to some customers as we're all human and want that human interaction, be it from a human voice or spontaneous chat exchanges. VAs provide them with that personalized human response, which provides a better customer experience.

Aside from a more personalized feel, VAs generally provide quality service. VAs are committed to delivering maximum value to their employers as well as ensuring and repeatable results. They are dedicated to their work and will do their best to give you high-quality service. We know of businesses that think VAs actually perform at even higher levels than full-time employees.

Six Roles for VAs

1. Video Editor

- Takes raw videos and uploads to YouTube library and Content Library.
- Chops them up, edits them, and adds captions and effects.
- Uploads to Facebook as drafts

Refer on page 54.

2. Operations Specialist

- Onboard new clients and specialists.
- Handles packages and billing via Infusionsoft.
- Follow up on dropped items.
- Schedule meetings, including reminders.
- Update Operations Process

Refer on page 53.

3. Content Specialist

- Transcribes audio
- Manage Quuu submissions.
- Lightweight editorial and coordination-- listicles, interviews, webinar summaries, Topic Wheels.
- Gather content to assemble Topic Wheel and other components of the client and internal Content Libraries

4. Designer

- Maintain guide iterations, working with full-time employees.
- Update master asset tracker and list of Infusionsoft landing pages.
- Create client-specific versions, including infographics.

Refer on page 53.

5. Community Management

- Lightweight responses on Facebook, LinkedIn, blog, Twitter, etc.
- Help users with basic questions-- sending them to relevant articles, videos, and courses.
- Manage connection requests for Dennis on Facebook.
- Answer the phone during core hours-- phone number on site, and Facebook messenger leads.

6. Engineering

- Implement plumbing on new client websites.
- Manage IF/THEN triggers in the Logic Builder.
- Configure new websites for clients and specialists (WPMU and integration).
- Update database schema documentation and engineering roadmap.

VA Hiring Checklist

1. Check Applicant's Initial Email.
- ▢ Keyword
- ▢ Video
- ▢ Onlinejobs.ph link

(If requirements aren't met, refer to this canned replies document)

2. Recommend Applicant for the First Phase.

3. Check Applicant's First Phase Email.
- ▢ Keyword
- ▢ Video

(If requirements aren't met, DQ.)

4. Recommend Applicant for the Second Phase.

5. Check Applicant's Second Phase Email.
- ▢ Keyword
- ▢ Video/Document/Other Form of Submission

(If requirements aren't met, DQ.)

6. Recommend Applicant for the Interview Phase.

7. Check Applicant's Interview Phase Email.
- ▢ Correct Email Format
- ▢ List of Documents/Video Links.
- ☐ Video links (Initial, First, and Second Phase (If applicable))
- ☐ Onlinejobs.ph profile link
- ☐ Resume
- ☐ Portfolio (if applicable)
- ☐ Goals Sheet
- ☐ Development Plan
- ☐ Perceived Strengths/Weaknesses
- ☐ 3 Skills You Are Good At and 3 Skills You Would Like to Learn

Hiring Process

Assumptions:

1. Job post has a link to a quiz.
2. Job post requires an applicant's resume.
3. Job post requires applicants to send applications to **hiring@blitzmetrics.com**.
4. A Job post contains the keyword, which depends on the role that an applicant must write in the initial email.

Job Posts:

Job posts contain the keyword that an applicant must write.

1. Virtual Assistant: [Work your own hours] [USD Pay] CHEERFUL, RESOURCEFUL, virtual assistant who can be a project manager too
2. Video Editing VA: [Work your own hours] [USD Pay] Awesome Video Editing VA needed for long term position ASAP [Flexible Working Hours]
3. Graphics Designer: [Work your own hours] [USD Pay] Awesome Graphics Designer for long-term position
4. Wordpress and all around Website Optimizer: WordPress and all around website optimizer [Work your own hours] [USD Pay]
5. Content Writer: [Work your own hours] [USD Pay] Content Writer Needed ASAP!
6. Community Manager/Client Operations Specialist: [Work your own hours] [USD Pay] Community Manager/Client Operations Specialist
7. Writer for Process Development and Systems Writer for Process Development and Systems [Work your own hours] [USD Pay]
8. Project Manager: [USD Pay] Project Manager

Roles:

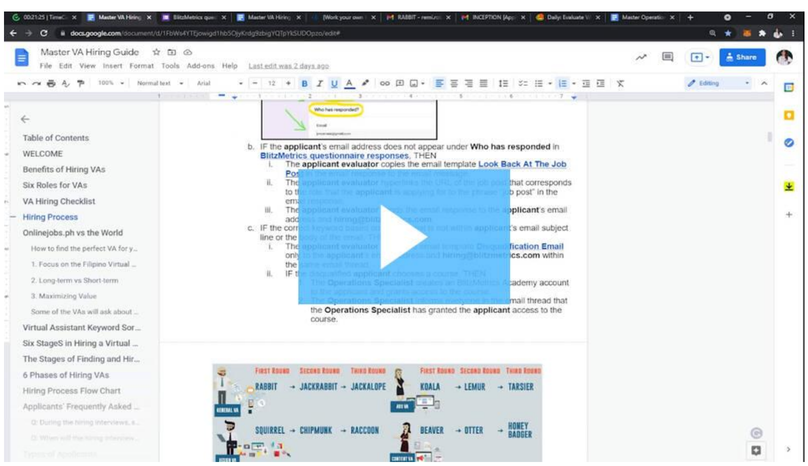
1. Applicant.
2. Operations specialist.
3. Application evaluator.
4. Interviewer 1.
5. Interviewer 2.

Rules:

1. There exists a Gmail account called **hiring@blitzmetrics.com**.
2. The applicant evaluator is able to log in to **hiring@blitzmetrics.com.**
3. The applicant evaluator forwards received email messages in **hiring@blitzmetrics.com** to the applicant evaluator's email address.
4. The applicant evaluator replies to applicants' email messages, and external email messages using the applicant's email address with hiring@blitzmetrics.com always carbon copied (CC).
5. The applicant evaluator always cc's hiring@blitzmetrics.com for all email messages related to hiring and job applications.
6. The applicant evaluator must not Archive, Delete, Move, Label any email message in hiring@blitzmetrics.com.
7. No team member uses hiring@blitzmetrics.com to reply to an email message.
8. Interviewer 1 can only interview once per applicant.
9. Interviewer 2 can only interview once per applicant.
10. All roles can fill other roles except that Interviewer 1 or Interviewer 2 cannot fill each other's roles.

Referrals

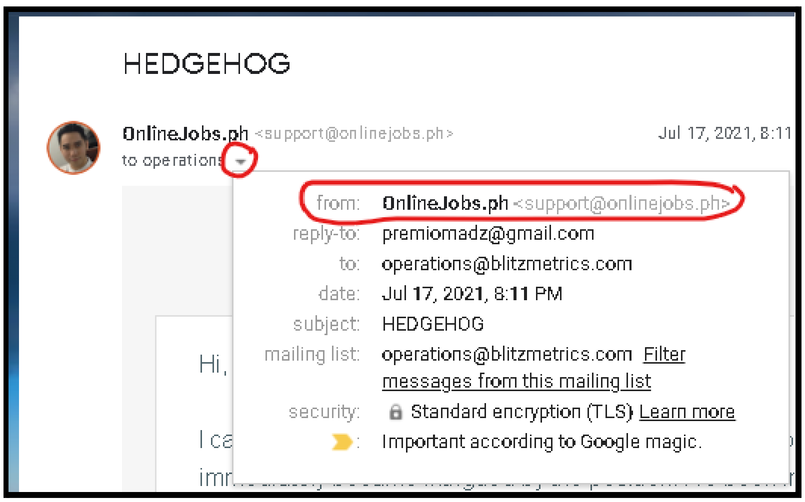
Most of the hiring referrals will come from Dennis Yu, a project manager, or another internal team member.



[How To Evaluate A VA Applicant During Round 1 Of The Hiring Process](#)

Process

1. **Operations Specialist** posts a job post to onlinejobs.ph or other platforms. Operations Specialist must modify the description at least once every week in order to bump the job post up to the front page. Changing the description more than once a week will not make a difference.
2. **Applicant** sends an email message to [**hiring@blitzmetrics.com**](mailto:hiring@blitzmetrics.com).
3. **Applicant evaluator** verifies if the email is a referral.
    a. IF the **applicant** claims an internal team member referred **the applicant**, THEN
        i. The **applicant evaluator** requests a screenshot of communication with the internal team member or a forwarded email and a 3-minute video showing a step-by-step walkthrough of the applicant's skills.
        ii. The **applicant evaluator** sends the link to all of the [**Job Posts**]().
        iii. The **applicant** sends an email message to [**hiring@blitzmetrics.com**](mailto:hiring@blitzmetrics.com).
    b. Otherwise, go to next step.
4. **Applicant evaluator** verifies if the email sender is not [**support@onlinejobs.ph**](mailto:support@onlinejobs.ph).



IF email sender is **support@onlinejobs.ph**, THEN

a. The **applicant evaluator** copies the email template [**Look Back At The Job Post**]() in the email response to the email message.
    a. The **applicant evaluator** hyperlinks the URL of the job post that corresponds to the role that the **applicant** is applying for to the phrase "job post" in the email response.
    b. The **applicant evaluator** sends the email response to the **applicant**'s email address and [**hiring@blitzmetrics.com**](mailto:hiring@blitzmetrics.com).

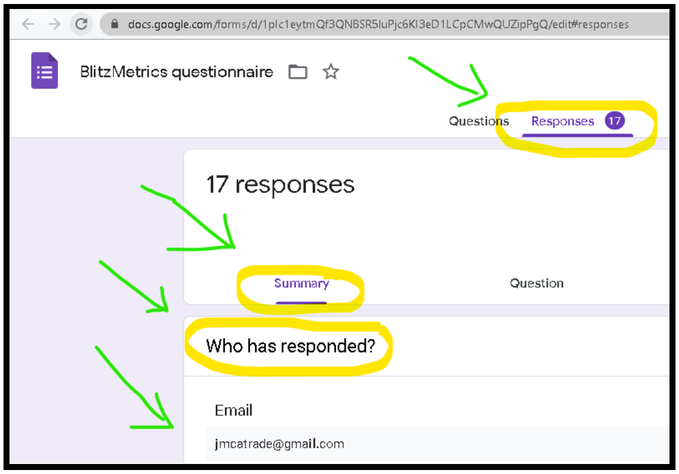
4. **Applicant evaluator** verifies the details of the one-minute video.
    a. IF there is no video, THEN

i. The **applicant evaluator** copies the email template **Look Back At The Job Post** in the email response to the email message.
ii. The **applicant evaluator** hyperlinks the URL of the job post that corresponds to the role that the **applicant** is applying for to the phrase "job post" in the email response.
iii. The **applicant evaluator** sends the email response to the **applicant**'s email address and **hiring@blitzmetrics.com**.

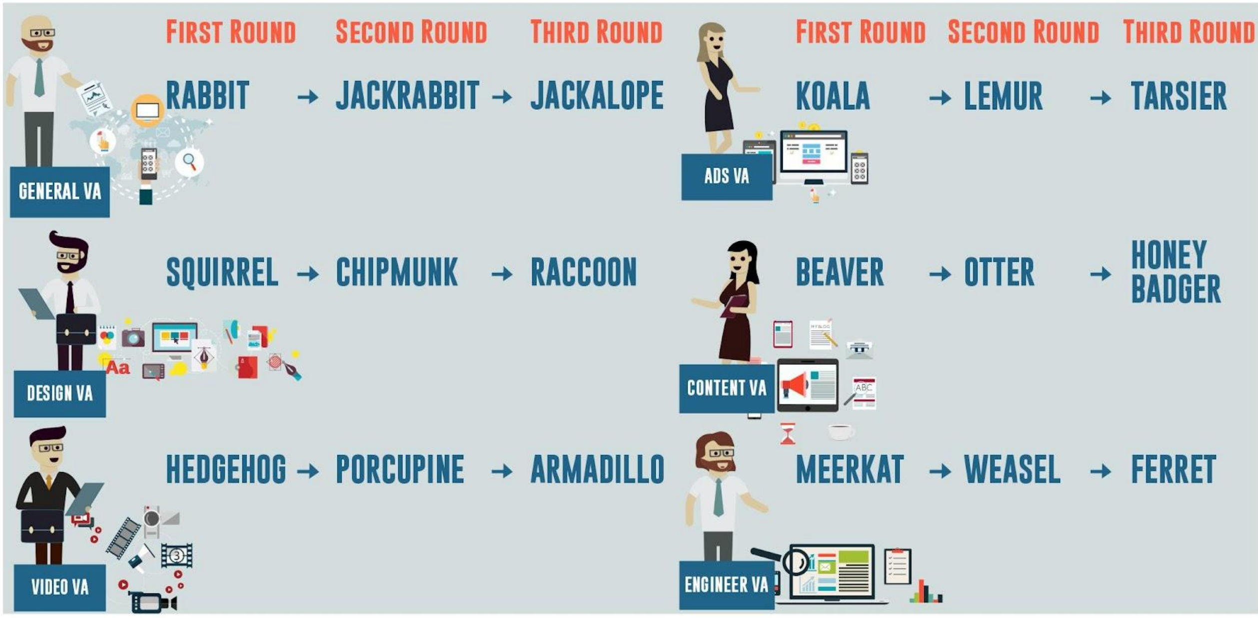
b. IF the video is shorter than 50 seconds, THEN
   i. The **applicant evaluator** sends the email template **Disqualification Email** only to the **applicant**'s email address and **hiring@blitzmetrics.com** within the same email thread.
   ii. IF the disqualified **applicant** chooses a course, THEN
      a. The **Operations Specialist** creates an BlitzMetrics Academy account to the applicant and grants access to the course.
      b. The **Operations Specialist** informs everyone in the email thread that the **Operations Specialist** has granted the **applicant** access to the course.

d. IF the **applicant** speaks with broken english or poor grammar, THEN
   i. The **applicant evaluator** sends the email template **Disqualification Email** only to the **applicant**'s email address and **hiring@blitzmetrics.com** within the same email thread.
   ii. IF the disqualified **applicant** chooses a course, THEN
      a. The **Operations Specialist** creates an BlitzMetrics Academy account to the applicant and grants access to the course.
      b. The **Operations Specialist** informs everyone in the email thread that the **Operations Specialist** has granted the **applicant** access to the course.

5. **Applicant evaluator** verifies that the **applicant** has answered the **BlitzMetrics questionnaire**.
6. The **applicant evaluator** must copy the **applicant**'s email address, then use the **Find** function to search for **applicant**'s email address. For Windows users, press CTRL+F to use **Find**. For MAC OS users, press CMD+F to use **Find**.



a. IF the **applicant**'s email address does not appear under **Who has responded** in [BlitzMetrics questionnaire responses](), THEN
    i. The **applicant evaluator** copies the email template [Look Back At The Job Post]() in the email response to the email message.
    ii. The **applicant evaluator** hyperlinks the URL of the job post that corresponds to the role that the **applicant** is applying for to the phrase "job post" in the email response.
    iii. The **applicant evaluator** sends the email response to the **applicant**'s email address and **hiring@blitzmetrics.com**.
b. IF the correct keyword based on the job post is not within **applicant**'s email subject line or the body of the email, THEN
    - The **applicant evaluator** sends the email template [Disqualification Email]() only to the **applicant**'s email address and **hiring@blitzmetrics.com** within the same email thread.
c. IF the disqualified **applicant** chooses a course, THEN
    i. The **Operations Specialist** creates an BlitzMetrics Academy account to the applicant and grants access to the course.
    ii. The **Operations Specialist** informs everyone in the email thread that the **Operations Specialist** has granted the **applicant** access to the course.



- Community Manager VA Keyword: “Inception”
- Process Development VA Keyword: “Process”

7. **Application evaluator** tallies the total points that the **applicant** obtained in the quiz by going through [BlitzMetrics questionnaire responses]().
   a. Multiple Choice
      i. Question 1’s expected answer: 0 to 24%.
      ii. Question 2’s expected answer: Alex.
      iii. Question 3’s expected answer: Jane.
      iv. Question 4’s expected answer: Alex.
      v. Open-ended questions
   b. Question 5
      i. The Answer must be a sentence.
      ii. The Answer must only be 1 sentence.
      iii. The Answer is wrong if the **applicant** writes “ask” or something similar.
   c. Question 6
      i. The Answer must be a sentence or sentences.
      ii. The Answer must be 3 sentences or fewer.
   d. The Answer must contain at least 1 of the following:
      i. Reasoning.
      ii. Argumentation

iii. Providing facts.
iv. Providing numbers or figures.
v. Providing evidence.
vi. Using logic.
vii. Providing a rationale.
viii. Sharing.
ix. Giving opinions.

e. Question 7
    i. The Answer must be 10 answers or fewer.
    ii. The Answer must have at least 5 of the following (If applicant's answer is close, you can consider it):
        1. Attendance.
        2. Working hours.
        3. Sales.
        4. Productivity, or output.
        5. Efficiency, or output with respect to time.
        6. Quality, or average deviation from expected output.
        7. Number of good habits.
        8. Low number of bad habits.
        9. Percentage of met deadlines.
        10. Occurrences of demonstrating independence.
        11. Occurrences of demonstrating resourcefulness.
        12. Occurrences of demonstrating adaptability.
        13. Total number of met deadlines.
        14. Percentage of fulfilled promises.
        15. Total number of fulfilled promises.
        16. Percentage of successfully followed directions, instructions or rules.
        17. Total number of successfully followed directions, instructions or rules.
        18. Number of suggestions for improvement.
        19. Number of proposed solutions to problems.
        20. Number of proactive and anticipatory steps taken.
        21. Number of steps taken for personal development.
        22. Low occurrences of procrastination.
        23. Low occurrences of making disparaging remarks.
        24. Low number of told lies.

25. Low number of confidential information revealed.
26. Intelligence Quotient (IQ) or occurrences of demonstrating being logical, analytical or scientific

f. Question 8
   i. Each and all answers must be an adjective.
   ii. The answer must contain no fewer than 3 adjectives.
   iii. The answer must contain no more than 5 adjectives.
g. The answer must contain none of the following:
   - Bad, Evil, Wrong, Terrible, Immoral, Unethical, Unscrupulous, Dishonorable, Wicked, Fraudulent, Crooked, Corrupt, Depraved, Indecent, Nefarious, Obscene, Sinful
h. Question 9

Note: An applicant's answer to this question is inconsequential.

i. Question 10
   i. Each and all answers must be an adjective.
   ii. The answer must contain no fewer than 3 adjectives.
   iii. The answer must contain no more than 5 adjectives.
j. The answer must contain none of the following:
   - Bad, Evil, Wrong, Terrible, Immoral, Unethical, Unscrupulous, Dishonorable, Wicked, Fraudulent, Crooked, Corrupt, Depraved, Indecent, Nefarious, Obscene, Sinful

8. The **application evaluator** sends an email message to the **applicant** on the result of the quiz.
   a. IF the **applicant**'s score is at least 8 points, THEN the **application evaluator** sends the email template **Qualifying To The Next Round** to the **applicant** and **hiring@blitzmetrics.com** in the same email thread.
   b. IF the **applicant**'s score is fewer than 8 points, THEN
      i. The **applicant evaluator** sends the email template **Disqualification Email** only to the **applicant**'s email address and **hiring@blitzmetrics.com** within the same email thread.
   c. IF the disqualified **applicant** chooses a course, THEN
      i. The **Operations Specialist** creates an BlitzMetrics Academy account to the applicant and grants access to the course.

ii. The **Operations Specialist** informs everyone in the email thread that the **Operations Specialist** has granted the **applicant** access to the course.

9. The **application evaluator** evaluates the summary and the video.
    a. IF **application evaluator** approves of the 1-page summary and the video, THEN reply with the email template **Interview Phase** only to the applicant, and **hiring@blitzmetrics.com**.
    b. IF at least one of the following is true:
        - The **applicant** has not provided a video,
        - The **applicant** has not provided a 1-page summary.
        - The **applicant** speaks with broken English or poor grammar.
        - The **applicant** makes more than 5 grammatical and typographical errors in the 1-page summary.

    THEN do the following:
        i. The **applicant evaluator** sends the email template **Disqualification Email** only to the **applicant**'s email address and **hiring@blitzmetrics.com** within the same email thread.
        ii. IF the disqualified **applicant** chooses a course, THEN
            a. The **Operations Specialist** creates an BlitzMetrics Academy account to the applicant and grants access to the course.
            b. The **Operations Specialist** informs everyone in the email thread that the **Operations Specialist** has granted the **applicant** access to the course.
10. The **applicant evaluator** requests an assessment for a Content Specialist applicant.
    - IF the **applicant** is not applying for the Content Specialist position, THEN go to the next step.
    - Otherwise, the **applicant evaluator** requests an internal content specialist (view Team Roster) to assess the **applicant**'s portfolio, THEN
        - IF the internal content specialist approves of the **applicant**'s portfolio, go to the next step.
        - Otherwise, the **applicant evaluator** sends canned note **Content Specialist Test Task** and:
            - IF the internal content specialist approves of the applicant's answer to the test task, THEN go to the next step.

- Otherwise, the **applicant evaluator** sends the email template **[Disqualification Email]** only to the **applicant**'s email address and **hiring@blitzmetrics.com** within the same email thread.
    - IF the disqualified **applicant** chooses a course, THEN
        a. The **Operations Specialist** creates an BlitzMetrics Academy account to the applicant and grants access to the course.
        b. The **Operations Specialist** informs everyone in the email thread that the **Operations Specialist** has granted the **applicant** access to the course.

11. The **applicant evaluator** verifies that the hourly rate in the personal development plan is $3 per hour.
    a. IF the initial hourly rate is higher than $3 per hour, THEN the **applicant evaluator** replies to all using the email template **Progress Through Our Leveling System** and waits for the applicant to respond.
    b. IF the **applicant** refuses to start at $3 per hour, THEN within the email thread, the applicant evaluator emails only the Director of Operations and **hiring@blitzmetrics.com** that the applicant refuses to start at $3 per hour.
    c. IF the **applicant** agrees to start at $3 per hour, THEN
        i. The **applicant evaluator** places the PDF summary in the **applicant evaluator's** Google Drive, and changes sharing settings to "viewable by everyone in BlitzMetrics".
        ii. The **applicant evaluator** enters the **applicant**'s information in the VA interviews tab of the Team Roster.
        iii. The **applicant evaluator** emails only interviewer 1 and **hiring@blitzmetrics.com** that there is an **applicant** in the interview stage.
12. **Interviewer 1** conducts interview 1 using canned note **Scheduling The Interview** and **TEMPLATE VA 1st Interview**.
    a. If approved, the applicant moves on to the next phase.
    b. If not approved, send a disqualification canned note.
13. Interviewer 2 conducts interview 2.
    a. If approved, applicant moves on to next phase.
    b. If not approved, send disqualification canned note.
14. Applicant reads and agrees to the Virtual Assistant Standard Operating Agreement.
15. Interviewer 1 or Interviewer 2 sends a job offer using a canned note through email.

a. If applicant approves, BlitzMetrics hires applicant.
b. If applicant disapproves, BlitzMetrics sends [unknown] canned note.

Onlinejobs.ph vs the World

A lot of websites are up like upwork.com, fancyhands.com and others that a lot of entrepreneurs confuse with onlinejobs.ph. There are stark differences between onlinejobs.ph as compared to other online job platforms.

How to find the perfect VA for you!

Watch this video on How to find the perfect VA for you!
Related Article: How Filipino VAs Change Your Business Outlook

Along with all of that, English is ingrained in their culture. It's the second language of more than 90% of them and over 60% of them are fluent English speakers; that's the best in Asia.

"The quality of their English depends on the VA role. Designers, video, and engineering don't have to be amazing, but can't be shoddy. Content VAs must be amazing, while Operations VAs must be very good. Everyone must have solid English skills, since they must be able to understand and teach our concepts."

1. Focus on the Filipino Virtual Assistants

John Jonas, founder of onlinejobs.ph, noticed four characteristics of filipinos that make them perfect employees:

- loyalty
- fast learners
- problem solvers
- dedicated workers

He also noticed that there was a vast majority of fresh graduates who were unemployed because of job-skills mismatch and the overall lack of job opportunities in the country. He wanted to change the lives of both entrepreneurs stateside and the amazing Filipino people who only needed a chance to prove their worth in the world.

2. Long-term vs Short-term

Websites such as upwork.com and fancyhands.com hire virtual assistants on a contractual basis. You pay x amount of dollars for one project which will take x amount of hours for a virtual assistant to complete.

After that, it's either you post a new project for virtual assistants to apply for and the cycle continues. This leads to robotic and impersonal output that appears out of touch to your specific needs.

In onlinejobs.ph, there is a belief in the value of providing a stable, long-term job opportunity for virtual assistants. This method has great implications for you as an entrepreneur and for your virtual assistant.

• Work is done with a greater understanding of your business

The advantage of hiring someone for the long-run is that you'll be getting work done with a more holistic approach as your virtual assistant knows the ins and out of your business, what it stands for and to whom the content is specifically targeted for. You'll be able to save money by requiring less revisions as they know your vision.

Training your Virtual Assistant

The beauty of having a virtual assistant is that you can start them off at a lower base salary as the inherent room for growth is apparent by providing training for them to "level up" and increase their workload in time. This allows you to see their progress and to evaluate the value they give you every step of the way. It also gives your virtual assistant a continued sense of accomplishment as they see a system for growth and promotion as compared to freelancers as they'll need to have the specific skill set immediately in order to "snag" the project.

As such, they'll demand more money but will only provide you with one-off value which will always be trumped in the long run by your dedicated virtual assistant.

Even if you're putting a VA on the right projects, you cannot assume they know all the details and systematic approaches.

For example, specialists might understand what it means to update a client's Content Library, why this is important, and how it fits into our processes.

But if Specialists and Managers are not explicit, VA's will make mistakes and do things like:

• blindly copy and paste every single Facebook post into this document-- burning weeks of time for something we could do in 10 seconds or have automated (which we do).

• insert irrelevant or negative content-- since they don't understand the 3 components of authority, even if we explicitly direct them to training on it and to update the 3 columns to score authority.

• bill 4 hours a day on an inactive project for months-- not wondering whether what they're doing has any value, if anyone is using it, or anyone even knows about it.

Filipinos are some of the hardest, loyal, and caring people we have. Their culture is just different from ours.

You have to be explicit about these components and make sure they understand the business value of these tasks, allowing them to grow into tasks tangential in the chain (to go from collecting content, to editing content, to cross-posting content, to boosting, etc).

What makes a senior VA is part skill (to bridge from a single task to working the entire value chain), but the understanding to think from the standpoint of a client-- what drives business value and what is "common sense".

When they see the bigger picture, you can start to eliminate systematic waste.

• Trust and Workload

Do you trust freelancers with your personal information? The simple answer is no. They'll only work for you one project at a time and the inherent risk of sharing your personal information is extremely high.

I'm not saying that you should trust your virtual assistant 100% but as time progresses and you develop that relationship that only time can nurture, trust will be easier to give. John even trusts one of his virtual assistants to manage his paypal account!

Along with that trust will be an increased workload. This is inevitable as they go higher through your leveling system. This will allow you to spend more time with family, your hobbies and really focus on working ON your business and not IN it.

3. Maximizing Value

At the end of the day, we understand the bottomline: maximize the value of every dollar you spend. Onlinejobs.ph accomplishes that for both you, the entrepreneur, and your future virtual assistant. For a fraction of what Indian, Pakistani and American specialists make ($450 to $1000+) every month; you'll be getting an individual who's grateful for the opportunity you've given them as well as have loyalty, honesty and an insatiable drive to succeed ingrained in their very existence. There are people like this in other nations but you'll come to find out soon that Filipinos will do their very best for you each and every time.

Related article: My Outsourcing Method is Different than Yours

You might think that you're low-balling them but, in truth, you're actually providing them with an above average salary as compared to their compatriots.

Furthermore, the concept of family is huge in the Philippines. The children take care of their parents when they become elderly, multiple family members live nearby each other. By providing them with an online job, you'll be allowing your virtual assistant more time to spend with their loved ones at home. You'll be allowing them more freedom to grow as people because they aren't chained to the usual transport problem in the Philippines which takes 2 to 4 hours of their days just to get to their 9 to 5 jobs.

WHY HIRE FILIPINO WORKERS?

• They're loyal

- They’re problem solvers
- They’re fast learners
- They take their jobs seriously

600 thousand College graduates entering the workforce yearly 18% Filipino College graduates are underemployed 6.5% unemployment rate 30% Filipinos are hired on a contractual basis

Some of the VAs will ask about pay, so here’s what you need to know.

Most VAs make $500 a month in the Philippines. That’s a decent living for a college-educated digital marketing specialist, low as it may seem compared to what we enjoy in the US. Awesome VAs make $1,000+ a month-- yes, it’s a monthly salary, as they don’t really do hourly and prefer to be loyal employees. Onlinejobs.ph is THE dominant site for VAs and their top range of pay is at $1k+ a month.

Our first VAs were at $1,500 a month, which is why we’ve gotten so many responses to our postings-- over 400 applicants. But only the very best will get this pay.

Instead of declining other promising VAs that have the right attitude but not the skill/experience, we can hire them at different grades between $500 and $1,000 a month, so at least they can start in our program and work their way up-- provided we have a joint understanding and expectation of this progression.

Of course, pay is DOE (dependent on experience) and performance over time, so it doesn’t really matter what their starting pay is, since the good ones will keep advancing.

Not the same 9 leveling system as we have in the United States, since these are different economic conditions and different roles-- but I hope we’ll have a 9 level operational support system in the next 90 days.

Then the specialists are focusing on modules 1-6 (primarily client facing), while operations are on modules 7-12.

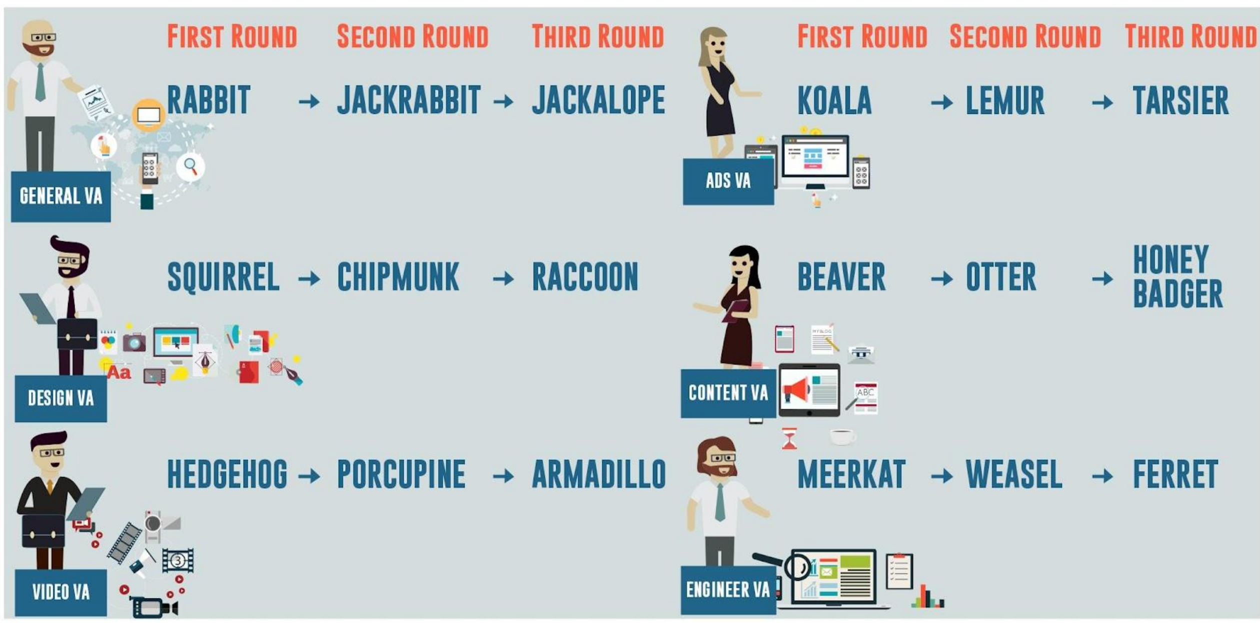
We’re not there yet, so I don’t want to open that topic until we have the first 12 modules solidly in place.

And once that’s ready, we can tackle modules 13-18, which is how we scale out this system with software and automation support, largely through the PEF, school system, and other organizations.

Virtual Assistant Keyword Sorter

When you post a job post on Onlinejobs.ph, you'll get hundreds of responses! Going through them one by one will be detrimental to your productivity and your time.

That's why we have our Virtual Assistant Keyword Sorter. You can customize this to anything you'd like as long as they're unique for each VA role and for each round. We use animals because they're unique and it'll be hard to miss in your inbox if you use these.



This will allow you to easily group all your VA applications according to their VA role and where they are at in your hiring process. It also adds one more way for you to make sure that your VA applicants are reading your messages intently.

Now when applicants submit their keyword (RABBIT, MEERKAT, etc), have them also say the role and stage (Ops VA: stage 1, Video VA: stage 2, etc...)

Six StageS in Hiring a Virtual Assistant

In this example, the applicant is tasked to put the subject line “rabbit” in their email response. This will place all their initial responses in one thread for your convenient viewing when you search the word “rabbit”.

Now that you know how to sort your potential applicants, let’s start hiring your amazing virtual assistant!

There are six stages in hiring a virtual assistant:

1. CREATE - Create a job posting on Onlinejobs.ph.
2. SEND - Send them content to study.
3. FILL - Fill out the Goals Sheet.
4. ONE-PAGER - Have them create a One-Pager.
5. INTERVIEW - Interview via video chat on Skype.
6. ASSIGN - Assign them a simple test project.

Now that you know why you should hire VAs, let’s now focus on ensuring that you get the BEST and BRIGHTEST available! **Create a job posting on Onlinejobs.ph.** Include simple task instructions that will weed through the pack of applicants-- simple instructions they need to follow when applying. (Example: Specific email subject line)

Send them content to study and have them make a one-minute video or write about what they learned.

- Allows you to test how well they can grasp concepts.

Test their English.
• Shows how fast they can take action.
Video: First Round (0:59)

Have them fill out a Goals Sheet
• Shows their character.
• We can see how we’re able to help them achieve their goals.
Video: Final Round (2:15)

Have them Create a One-Pager (A page with all this information)
• Onlinejobs résumé, normal résumé, videos they’ve made, Goals Sheet.

• This organizes their information. It is also another test to see if they can follow instructions.

Interview via video chat on Skype

• Ask questions about the content you had them review.
• Ask other intelligent questions that correlate with your niche.
• Interview Template for Operations Specialist Applicants

Assign them a simple test project

- Use this to test their ability to execute with instructions.
- If they pass, then they're hired.

If they fail at any step of the way, they are DQ. If it's a minor fail, you can give them another task to see if they can make up for the mistake.

Three things we go by when asking, "Should we hire?

- No
- Maybe
- Heck Yes

Stage 1: Create a Job Post in Onlinejobs.ph

In order to get a quality VA, you'll need to make a job post that communicates all the tasks you need them to do regularly as well as relay all the expectations you have of them. If you made this correctly, you'll be able to weed out the serious candidates from the pretenders, as only the serious ones will read a lengthy job post thoroughly.

Hiring Process for VA's on Onlinejobs.ph

Watch this video to find out how BlitzMetrics hire amazing VAs using Onlinejobs.ph

Sprinkle in some simple task instructions such as addition, subtraction or any similar math equation, including a "keyword" in the subject line when responding to your job post and other simple instructions you can think of that they'll need to follow in applying.

Here are examples of job posts you can use as templates
Video Editing VA
Content Specialist VA Design VA
Engineer VA Operations VA
Community Specialist VA

After they send you their initial response, you should check their profile on Onlinejobs.ph to get an idea of what their strengths and weaknesses are!

You'll be able to see his/her basic information such as age, IQ, DISC, and English mastery scores.

If you're a premium member, you can also do a background check on

You can compare their onlinejobs.ph account (yellow) with their Facebook account (blue).
Note: Specific applicant details have been removed for privacy reasons.
You'll also be able to take a peek at other information you might want to know, such as:

Related Accounts

Our algorithms in determining if someone has more than one account that are pretty sophisticated. We don't catch people 100% of the time, but we're really good at it.

While having 2 accounts associated with the same person isn't automatically a red flag, it's something to be aware of. 2 accounts often happen because someone forgot their password, or they forgot if they still had an account, or if they changed their email address. It also happens because people live in the same house and are sharing a computer. 2 accounts which are significantly similar (generally looking for the same type of work) may be a problem of the person trying to keep 2 jobs with 2 different employers without each other knowing.
2 accounts with significantly different info (like, one is a webmaster and the other is a writer) is usually not a problem. Sometimes someone trying to get multiple jobs will use a "cousins" name/facebook account/photo to create a legitimate second account with a high ID proof score. You can usually identify if this is a problem when their skill sets or job descriptions are very similar.

Look at the other account associated with this one. Look for irregularities between them (like the same facebook profile used on both accounts...).

Employment History

Email patterns are indicative of looking for a job. If someone is always sending emails, they're always looking for a job. Usually someone who is actively sending emails to employers will find a job within a month.
If you've already hired this person: If a worker is sending emails after you've already agreed to hire him then it's worth investigating. Sending emails means someone is looking for a job. If they're emailing someone else while working for you... well...

Workers who send emails month after month are continually looking for work. Often this means they're working more than one job or they're commonly doing contract work. In and of itself it's not bad. But it could be indicative of a bigger problem.

If everything is in order after you looked at their profile and done a background check on them, it's now time to move on to the next stage!

Stage 2: Send Them Content to Study

This allows you to test:
• How well they grasp concepts
• Their English
• How fast they can take action
As a guide, there are three phases in this stage:

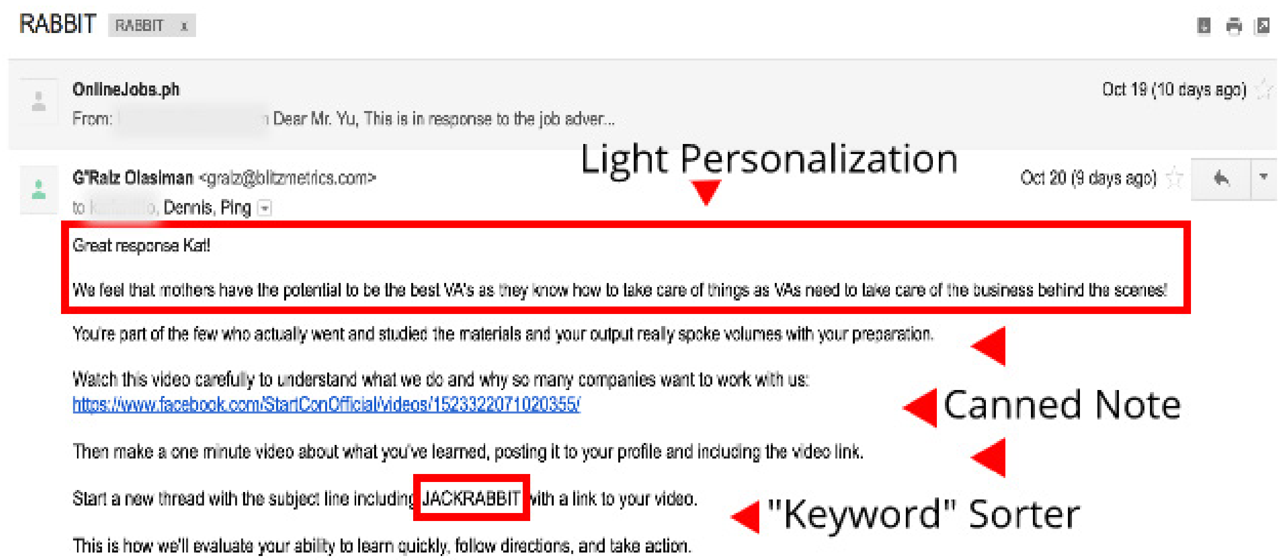
Initial Round: General Concept/Goal of your Business
• Provide content regarding why your business does what it does.
This will let them empathize and understand your business on a deeper level which will lead to a higher level of performance.

Second Round: Educational/Training Videos
• Provide content regarding your daily tasks/concepts on how your business works.
This will give them more insight on how and what aspect of your business they can be of the most help.

Third Round: Promotional Videos
• Provide content on what you're selling or what services you offer your customers.

This will give them a better understanding of what you do as a business.

You can use “canned” notes for these different stages. It’ll save you time and ensure that all candidates will have the same application process experience.



This is an example of a “canned” note for progression to the 2nd stage of an ***Operations Specialist*** application:

You’ll see that the applicant has the “**RABBIT**” subject line indicating that she just submitted her response for the initial round.

A “**canned**” note comprises of three things:
• A “**personalized**” response this portion gives the impression that you’re totally engaged with the applicant and that you’re connecting with them.

• The core note template this portion contains the actionable task/learning point you want them to do/learn for consideration for the next round.

• “**Keyword**” sorter for the next round keeps the linkage of rounds intact and lets you know at what stage particular applicants are.

Stage 3: Goals Sheet and Proposed Development Plan

• **Goals Sheet**
- Shows their character
- Shifts the focus from you to them
- Gives you insight on their perceived skill level

- Lets you see their short to long term goals
- Lets you examine if you can help them achieve their goals
- Happy employees are efficient employees

• **Proposed development plan**
- Lets you see their desired salary
- Lets you see how they gauge their skills/expertise/knowledge - Lets you see how they want to grow in the company and if you can support them in their growth

Here is the Goals Sheet Template.
Here is the Goals Sheet Example.
Here is the Proposed Development Plan.

Stage 4: Create a One-Pager

This step organizes their information. It also acts as another test to see if they can follow instructions and how fast they can take action.
• Onlinejobs Resume, Goals Sheet, Proposed Development Plan

Stage 5: Interview via Video Chat in Skype

• Ask questions over the content you had them review
• Ask other intelligent questions that correlate with your niche
• Interview Template for Operations Specialist Applicants

Stage 6: Assign them a Simple Test Project
Use this to test their ability to execute with instructions. If they pass, they are **HIRED!**

Note: If they fail at any step of the way, they are DQ.

If it's a minor fail, you can give them another task to see if they can make up for the mistake.

Compensation and Work Alignment

We've raved about how virtual assistants are extremely efficient and at the same time provides you with a cost-effective option.

As with everything, virtual assistants aren't created equal. Some are fresh graduates while others might be in the business for a long time.

This is the great thing about finding a virtual assistant: you get to choose from a multitude of people with drastically varying experiences and skills, along with different potentials of growth. This is where you, as an employer, should choose what kind of virtual assistants you need. Do you want someone who's a greenhorn but has an extremely high ceiling or a veteran but has little to no room for growth.

Each has their own strengths and weaknesses. To help you decide what type of VA you're looking for, answer these questions:

1. What salary range are you willing to pay for your starting VA?
   A. $2 - $3.99
   B. $4 - $5.99
   C. $6 - $7.99 $8 - higher

2. Are you willing to train your VA?
   A. Yes
   B. No

3. Are your tasks specific or general?
   A. Specific
   B. General

Let's go through your answers!

For question 1:
$2 - $3.99:
Greenhorn - Little to no experience with high potential for growth.
$4 - $5.99:
Low Intermediate - 1 month to 1 year experience with room for growth.
$6 - $7.99:
High Intermediate - 1 year to 3 years experience with established
skills.
$8 - Higher:
Expert - 3 years onwards experienced with established skills and has a track record in leading teams or systems

For question 2:

Yes - the best options for you are ***Greenhorn*** and ***Low Intermediate***.
No - the best options for you are ***High Intermediate*** and ***Expert***.

For question 3:
Specific - the best options for you are ***High Intermediate*** and ***Expert***
General - the best options for you are ***Greenhorn*** and ***Low Intermediate***.
In order to accurately qualify potential virtual assistants, you'll need to make a checklist of hard and soft tasks in your business which will serve as a basis for a raise and will give you an easier way of monitoring their growth and the value that they add.

This method gives your VA an incentive for working hard as learning new skills or tasks will lead to more job security while also giving you a better understanding of your VA's true worth.

In BlitzMetrics these are some, not all, of the "hard" and "soft tasks":

Hard Skills (tools-based) - for $1 an hour that you could develop and why they're valuable.
• ***Infusionsoft:*** to clone Campaign Builder funnels for our courses and operational processes for agency clients.
• ***Facebook ads:*** to execute personal branding packages and general remarketing sequences to drive list building and revenue.
• ***Reporting tools*** (Tableau, Google Data Studio, Excel, MySQL): to do detailed brand analysis and create relevant charts/ presentations.
• ***Video editing tools*** (HitFilm, Premier, Camtasia, FCP): to produce speaker reels, course summaries, promotional videos, and other assets fit for publishing and promoting.
• ***Content editing tools*** (Word, PowerPoint): to produce articles worth publishing on our contributor channels, reflecting pro-level expertise.

Soft skills (not tools-based) - built into the 6 phase VA career path for:

• ***Team lead:*** Mastery of #DDD and #CID on your own projects.
• ***Manager:*** Show our senior team that you understand how to also train, encourage, discipline, hire, and fire, based on our Operations Process.
• ***Figurehead:*** Through your own well-documented examples, develop detailed checklists for other VAs to follow, and have proof that hundreds of VAs have been able to achieve the result from following your checklists in that skill area, with minimum support along the way.

Note: Let this serve only as a guide as each niche has different progression points in terms of hard and soft skills for virtual assistants.

Hiring VAs FAQ

What can a VA do for me?
A VA can be more than just an assistant. They could be a programmer, graphic designer, and so on. The Philippines has the full spectrum of skills that you might need. VAs allow you to work on your business instead of in your business

What can I expect from VAs from the Philippines?
Can you expect a VA to get good, full-time work done but also be an affordable investment? Absolutely!

What makes hiring from the Philippines different?
We've seen firsthand that our VAs are capable of doing great work from home where they are comfortable and, therefore, able to accomplish tasks more efficiently. They are no longer held back by commuting and dealing with the traffic problems which makes employees feel burned out even before they start working in the office. A significant number of college graduates, trained individuals, and overall, talented, hard-working Filipinos are underemployed or unemployed. By hiring Filipino VAs, we help with the country's unemployment problem and provide career opportunities that they would typically not have access to so they can grow professionally.

How do I delegate work to my VA?
We use checklists that VA's can learn and execute so we can concentrate more on growing our business.

What is the filtering process?
Our VA prospects go through a 6-Stage Qualifying Process. This includes a test project that they work on so we can measure their capability and communication skills. Through this process, we can see if they are a good fit for us and also see if we are a good fit for them.

The Six Phase Filtering Process

First Phase:
Receive response to Onlinejobs.ph post

Second Phase:
Reply with click “Hey [INSERT NAME]”

Watch this video carefully to understand what we do and why so many companies want to work with us:

Video: Let’s Talk Growth - Dennis Yu

Then make a one-minute video about what you’ve learned, posting it to your profile and including the video link.

Start a new thread with the subject line including JACKRABBIT with a link to your video.

This is how we’ll evaluate your ability to learn quickly, follow directions, and take action. What we care more about is not where you currently are, but your daily, regular progress.

In most companies, pay is contentious because favoritism and an inability to measure individual value creates politics.

Most companies also have a fixed structure that doesn’t allow people to keep progressing and get direct help with their goals.

In fact, the advancement of one person comes at the expense of others, since most companies have limited “spots”.

There is no zero-sum in our company.

If you can demonstrate competency through repeated execution, then you deserve advancement and company-wide praise for it.

The time span for each level is not a union model, where you get automatic advancement after X amount of time.

This creates the right incentive system.

What we'd like to see is that some senior VAs grow to be able to run a team that executes packages-- to then have P&L responsibility that comes at Level 6+ in the US-based specialist system.

In short, isn't it better to come in a bit on the "low side" and be quickly promoted, than to come in slightly high and have scrutiny?

And to know that you read it and watched the accompanying video, kindly like, share, and comment on the article. Thank you!"

Third Phase:
After they respond to your first email, reply with "Hey [INSERT NAME],

Now go deeper and watch this TWO HOUR internal strategy: Show us you understand the nuances here and tell us what you think-- disagreement, personal application to you, and so forth. Not promotion-- education.

Share your response in whatever format you think showcases your strengths and understanding best-- to reveal interesting, non-obvious points.

Video: Phoenix Day 3 RAW Triangles: Specialist: Finance (1:55:54)

And then send a note to me with this, recapping your understanding of the job post and why we have such a process to prevent failure, while encouraging iteration. Use JACKALOPE in the subject line, which puts you in the final stage of candidates."

Fourth Phase:
After they respond to your second email, if they're still interested and seem to be a good fit, reply with "The last phase"

It's a ***two step process:***

First I will interview you and if you pass, you'll be interviewed one on one by Dennis himself. But before all that, we'd like you to make your own goals sheet and professional development plan.

Refer to this regarding your development plan:

Video: VA Development Plan (1:23)

Linked are the templates for both the goals sheet and a proposed development plan.

Here are some of the hard skills (tools-based) for $1 an hour that you could develop and why they're valuable:

- Infusionsoft: to clone Campaign Builder funnels for our courses and operational processes for agency clients.
- Facebook ads: to execute personal branding packages and general remarketing sequences to drive list building and revenue.
- Reporting tools (Tableau, Google Data Studio, Excel, MySQL): to do detailed brand analysis and create relevant charts/ presentations.
- Various video editing tools (HitFilm, Premier, Camtasia, FCP): to produce speaker reels, course summaries, promotional videos, and other assets fit for publishing and promoting.
- Various content editing tools (Word, PowerPoint): to produce articles worth publishing on our contributor channels, reflecting pro-level expertise.

and so forth....

And there are soft skills (not tools-based) that are built into the 6 phase VA career path for:

- **Being a team lead:** once you master #DDD and #CID on your own projects.

- **Being a manager:** to show our Senior Team that you understand how to also train, encourage, discipline, hire, and fire, based on our Operations Process.

- **Figurehead:** Through your own well-documented examples, develop detailed checklists for other VAs to follow, and have proof that hundreds of VAs have been able to achieve the result from following your checklists in that skill area, with minimum support along the way.

5th phase- On-boarding process:

If an applicant has passed your screening, send a job offer email

Hi, {Name}!

{Personalized Note}

After discussing with the team, we decided that you are a great fit for {CompanyName}!

*We're excited to bring you on board as an **{JobTitle}** starting at {HourlyRate}.*

You will learn about our Level 1 Specialist Course. We will help you create a path to reach your Professional Goals with {CompanyName} and be available to help along with your team members, including me!

Your official start date will be {Date}.

If you would like to accept, please reply YES to "reply to all" in the next 3 days. If you have any questions please let us know. We are excited to have you on the team, I know you will do great!

You should on-board your new VA with all your assets including a new email, basecamp or project management account, business manager account, boomerang, timecamp or time tracking account, and give them any training courses you want them to take.

6th phase- Leveling Up:
You should want your VA to grow and continue to tune their skill set. You should also want to reward them for this because they will start to provide even more value to your business. As they are cared for and see their progression they will continue to do better work.

Hiring Process Flow Chart

STEP 1:
After they have completed the Qualification Task, have two interviews with the team lead, then if they pass, a final with the manager.

STEP 2:
Offer a position to them, or send them a declined email.
[Offer position email]
[Decline Email]

STEP 3:
If they accept, send them the online certificate for passing the Qualification Phase and becoming a Certified Specialist

STEP 4:
The team lead should send a company note out making sure they include the following:
Send to **all@yourcompany.com**
A. Lead's welcome note to his/her own words
B. New hire's Public Figure Page
C. New hire's Goals Sheet
D. New hire's Why Video

STEP 5:
Operations team should fully onboard them following our onboarding checklist

STEP 6:
Team lead must have a call with the new hire to go over Level 1 Specialist rules, their new specialists path to leveling up and reaching their goals and to answer any question they may have.

Applicants' Frequently Asked Questions

Question: During the hiring interviews, what hardware should I use?
Answer: You may use a phone or a computer so long as the hardware has video capability.

Q: During the hiring interviews, should I turn on my camera?

A: You must have video on during interviews.

Q: When will the hiring interviews take place?
A: The interviewers will conduct the interviews when each of our schedules align. The interviewers will inform the applicant of all available dates prior to the interview.

Types of Applicants

There are two types of applicants:

- **Individuals:** applicants who represent themselves and act as independent entities.

- **Syndicate:** a company or group of individuals that work together to increase their profits.

In general, you'll be dealing with individual people looking for job opportunities. We highly recommend dealing with applicants that fall under this category for three reasons:

Affordability
It's more affordable to work with individual virtual assistants as compared to syndicates. On average, the starting salary for a FIlipino VA will range from $250 - $500/month depending on their background and expertise, if any. For syndicates, they'll be demanding $500 - $750/month to start but the virtual assistant that they'll give you will only get $250/month which means $250 - $500/month will go to people who haven't even given you any value while the person that's been working for you has been getting only $250. Even if you doubled the pay of an individual VA from $250 to $500, it would still be cheaper than the $750 you'll have to pay a syndicate. Plus, giving your VA a raise will boost their morale as well as incentivize them to work even harder for you while for syndicates, even if you increase their salary, a portion of that raise will go to the syndicate itself.

2. Personalization
Some syndicates try to maximize their profits by intertwining their clients, you and a bunch of other small to mid-sized companies, and divide teams into specific systems i.e. Infusionsoft, Wordpress, LMS, Digital Marketing. This will churn out faster iterations and will give you a feeling of increased value.
The problem with this set-up is that it's prone to churn out similar or identical output for the multiple clients they have. You want to be UNIQUE and STAND OUT from the crowd right? You don't want to blend in!

It might take a longer turn-around time for one VA to churn out iterations on Infusionsoft, Wordpress, or on FB marketing but at least you're sure that your guy/girl understands what your goals are and the intricacies of your business which will allow them
to produce content which is as close to your vision as possible. Tying in with number 1, you can expand your team if you feel like one VA can't handle the workload alone anymore. Three VA's who're fully-dedicated to you is way better than one VA from a syndicate at the same price.

3. Relationships

We are people and "no man is an island". We invest in relationships and people that we talk to on a daily basis. The same thing goes when hiring virtual assistants. You'll be building relationships with your team as you'll be working with them closely in the hopes of expanding and exploding your business. You build relationships with individuals and not syndicates. You might be building a relationship with the VA assigned to you by the syndicate but it won't be the same as having a VA who's 100% focused on your business and 100% giving you value for every dollar you give them. This will lead to a better relationship.

In our hiring process, we recommend that you conduct a Skype interview for this purpose: to see if you're comfortable with communicating with them as you'll be doing that extensively in the future if you choose to hire them. John Jonas shared his experience with hiring a syndicate as compared to hiring an individual applicant.

Also be aware of syndicates "acting" as individual applicants. This is where a thorough background check is needed as you'll be able to see the number of job posts applicants have applied for and other indicators of fake accounts.

Virtual Assistant Career Path (6 Levels)

Add one or two sentences regarding their application and the video they submitted when recommending an applicant (Nothing more and nothing less).

When VAs apply, let's not only have them use the special animal keyword, but also mention the phase and job they're applying for when we are communicating about them.

These are the evaluation questions for the group interview, for those who have passed through the initial stages:

- We show up 5 minutes before to see who is early, on time, and late. 3 points if more than 3 minutes early. If late, even if only a few seconds, minus 5 points.
- How is their appearance for an interview-- not a t-shirt, not on a mobile phone, clearly. 3 is great and 0 is terrible.
- What questions do you have for us before we begin? (of course, we've already begun-- 3 is thoughtful questions and 0 is terrible.
- From what you've learned so far, what is the hardest part of this role? 3 are thoughtful questions and 0 is terrible.
- How do you deal with an unhappy client? (group discussion). Up to 5 points based on quality of answer, with zero by default.
- What does a perfect day look like for you? We're looking for people who are active, helping others, learning-- not vacationing and spending money. Up to 5 points.
- Discuss how community managers grow into managers-- what makes a good manager? Up to 3 points.
- Long-term, strategic fit. 0 to 5 points, with 5 being incredible.

Interviewers:

- Add up scores for each candidate.
- Score as "Hell yes!", "maybe", and "no".
- Maybe means no, of course.

What VAs Do I Need?

I posted two jobs for hiring 3 VAs and got 285 applications in the last 24 hours.

Want to know the super-effective process for how we quickly and accurately narrowed the list down to just 15 and then down to the final group?

In short, we put a ton of detail in our postings, especially with article links and a codeword for them to use in the subject line of their initial response.

RABBIT is the one for our VA and SQUIRREL is for the designer.

Gmail sorts by threads and by subject lines, so they automatically group responses.

50% get knocked out instantly, but sometimes I'll make exception (see canned note #1).

Of the initial cut, we look to see if they have personalized their response.

Another 50% of that gets knocked out. Of the most promising remainder, we look at:

- Did they include a one minute video?
- How good is their English?
- How strong is their portfolio and profile?
- Do they have a cheerful, positive personality?

Maybe means no-- so if not HECK YES, then NO, since there are so many amazing ones.

Then we provide one sentence of personalization, not just to show we care, but to ask them follow-up clarification questions. And then we paste in canned note #2, for more content to consume and another video to make.

Of the 5% that pass this filter (which is still 15 people out of 300), we are reasonably certain they would be great employees.

However, we want our internal people to screen them and pick 3-4 of the remainder to hire.

Of course, we don't have to hire 3-4 people-- we could do more or less based on the pool and our needs. Our needs have been growing for this type of support.

But generally, we should be able to get:

Designers-- to help out on guides, infographics, client proposals, skinned documents, personalized dollar bills, website tweaks, video effects, and technical stuff.

General VAs-- to help with basic operational tasks: creating basecamp projects, assembling documents, transcribing videos, editing content, Excel work, and project management. When we get strong, full-time folks that want to do this as a career, we don't get the flakiness that we have designed for in the specialist program, since these internal folks must be stable and here for the long-run.

They're also paid less-- most are making $4-6/hour, which is good money, even for a college grad in the Philippines.

We're basically doubling this, since we want the best-- folks who don't need micro-managing and can cover multiple positions.

You get this training on hiring VAs as one of a dozen modules in the Agency Management Course.

VA Onboarding

Once you've made a BlitzMetrics email address for the new hire and given that email address to BaseCamp, YouTube, Facebook Business Manager, TimeCamp and Google Drive; the next step is to send them materials on how to navigate and use each tool.

If you've hired a virtual assistant adhering to the phases we taught you, the next step is to onboard them. Other companies would need a lengthy time of coaching/spoon feeding to help their new hires catch up but because our hirees have gone through a vigorous process, we're sure that they're hungry
and can work immediately with just simple instructions and links to valuable assets. Here's the list of links and simple instructions we give our newly hired VAs.

1. Basecamp

A. Overview
B. Basecamp
C. How to Create a Message
D. Notification Settings
E. How to Log in to BC2

2. Youtube

A. Navigation
B. How to Upload Videos

3. TimeCamp

A. How To Record Time In TimeCamp.
B. How To Add A New Time Entry In TimeCamp.
C. How To Fix Time Entries By Adding The Correct Basecamp User.
D. How To Choose TimeCamp Entry For Course Updates.

Important Excel Articles/Videos for Starting Members

A. Articles:
http://www.influencive.com/must-hope-best-prepare-worst/
https://blitzmetrics.com/dont-make-chase/
https://blitzmetrics.com/the-hidden-but-most-obvious-reason-yourcampaigns-are-failing/
https://www.dennis-yu.com/the-hidden-reason-why-you-are-failing/

B. Videos:
When to Use Email vs Instant Messaging

4. Plumbing:
Video: How to do Basic Plumbing

MOST IMPORTANT!!! #CID:
Video: [#CID - RACI with Example]

Tasks and Responsibilities/ Figureheads

Tasks and Responsibilities
1. Operations
2. Design
3. Video Editing

Figureheads

1. Operations:

What You Do: Operations play a critical part in any business since it handles the successful delivery of products and services. Part of what we do is to make sure that we are able to deliver the services to our clients - this includes responding to client inquiries, providing support on client projects, and light project management in course and guide production. We work and support our onshore team to make sure that our clients get the best service or product that we can offer.

How Others can Become a Figurehead: One can be a figurehead by making sure that the principles of DDD, CID, and LDT are nailed down. As a figurehead, you are a role model that others in the team can follow and reliably lean on.

2. Design:

What You Do: I am currently a VA level 3 specialist and team lead of the design team. As a team lead my main responsibility is for the creative execution of cross-categorical projects and overseeing the quality and visual integrity standards of BlitzMetrics. Our design team can also be called "the visual storytellers" because we bring data to life through graphics and data visualization, as well as designing key elements for presentations and express/premium guides and packages.

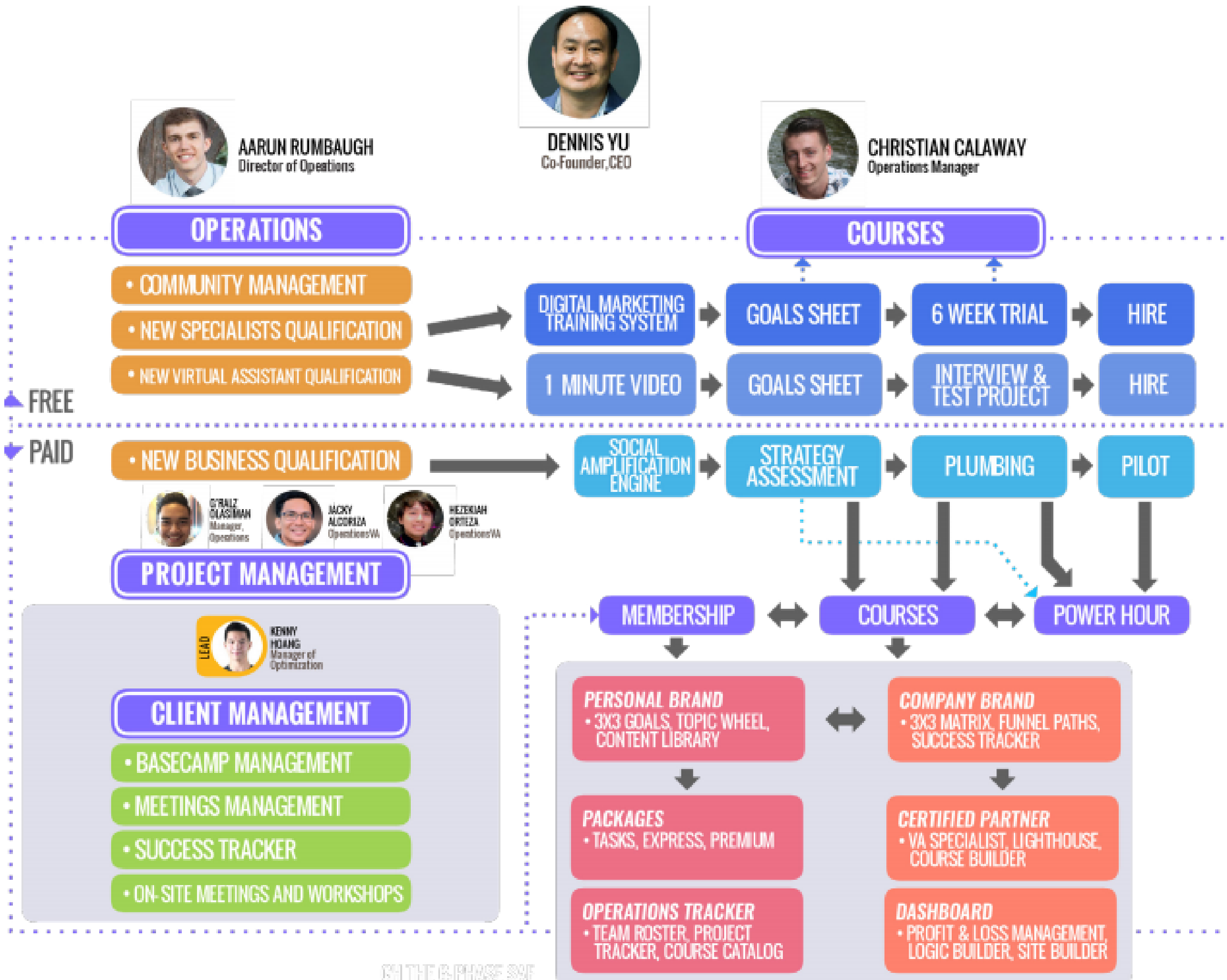
How Others can Become a Figurehead: Aside from mastering all the nine triangles of BlitzMetrics. To be a good leader you also have to be a good servant. I am fortunate to be in a servant-leader culture inculcated by Dennis. If you are a servant leader... humility, integrity and everything will follow.

3. Video Editing:

What You Do: Video Editing is one of the crucial roles in the team as we encourage our clients to make one-minute videos for a dollar-a-day. As a video editor, my main responsibility is to make sure that our videos are edited based on the standard that the company holds, may it be promo videos, one-minute videos, speaker reels, tutorials and teasers. Imagination, creativity and attention to details are essential skills that a video editor must have in order to generate the best possible video output. From placing video hooks to placing lower-thirds to proper color grading to sequencing the clips to mixing in the perfect music bed to enhancing the vocal narration to placing catchy titles, these are some of the main things needed to be considered in the editing process.

How Others can Become a Figurehead: You must be willing to learn and improve continuously. Learn the basics of the nine triangles and improve thru constant application of those concepts. Never cease to learn from others and accept opinions constructively. Skills are vital but Attitude is more important.

Operations Diagram



Special Gift for Dennis from the VAs

This is what happens when you treat people right. Dennis Yu is one of the best at it! Dennis recently had a birthday and his awesome VA's made this special gift just for him.

[**Special Gift for Dennis Video**]

VA Pay Scale

L2: Pay - $4/hour Client Level
- 20 Personal Branding Accounts and 4 Small Business Tasks
- Ad Budgets, Audience Creation, Basic Level Client Ad Tweakin

L3: Pay - $6/hour Client Level
- 12 Personal Branding Accounts, 4 Small Business and 2 Large Business Tasks.
- Loading and Duplicating Campaigns, Ads and Ad-Sets, All L2 Work.

L4: Pay - $8/hour Client Level
- 8 Small Business, 4 Large Business and 2 Enterprise Tasks.
- Coordinating with content VA's, Overseeing L2 and L3 VA's, All L2 & L3 Work.

If you REALLY like a new candidate, you can hire them at up to $6/hour to start so that we can bring in higher quality talent.

But their first month is still provisional, so if they don't perform at that level, they either must revert to the appropriate level or leave.

After all, we must be fair to everyone else who has leveled up.

Workshop One-page Verification

Your Brand

- Public figure page created
- Company Facebook page
- WHY video made
- 3x3 grid complete
- Website ready
- Plumbing setup
- Remarketing pixels working
- Website Custom Audiences setup
- Dollar a day boosts ready

People Management

Promotions

Generally, we give raises based on not their age, but their performance. We want people to earn it.

Occasionally, people will leave the company which may cause other team members to feel somber. Other people leaving the company sucks, but it shouldn't be an excuse to be unproductive.

After all, removing unproductive people is a good thing for them and for us-- since continuing to reward unproductive behavior injures the company and sends the wrong message.

Strive to move towards a culture that rewards performance, instead of encouraging people to find ways to make excuses for raises, as opposed to actually showing they increase their output and skill.

Responsibilities of a Team Lead

1. Verify if your team members are abiding by the guidelines that we wrote in the Level 1 Specialist Course, Level 1 VA Course, and TimeCamp Guide.
2. Check if your team members' work hours match their target hours in the Team Roster and make sure that you notice when they don't match.
3. Consult your team members' if they have too much or too little on their plate. You can go back to their To-Do list and view at a glance if they're able to cope with their workload. If they're asking for more tasks and you don't have any to give them, escalate to your other Team Leads, then to the Chief Executive Officer.
4. Hire more team members for your team if you believe that your team is not able to complete tasks you assigned to them in a timely manner or if the task backlog is too large.
5. Update the Team Unavailability Sheet whenever one of your team members is unavailable for a certain day or set of days.
6. Conduct daily team calls and fill in the Daily Team Call sheet.
7. Assess the quality and adherence of team member's tasks.
8. Always inspect invoices before paying, especially final invoices.

   Sometimes people who quit or are fired will submit high hours for limited work, perhaps because they need the money or believe they have nothing to lose by doing this. If we see people who bill full-time but don't reply to messages, we know there is a disconnect here in their stated output. Ideally, we catch this way before it gets to this point, so we correct the productivity issues before it results in them leaving.
9. Sending an announcement of someone's promotion to all@blitzmetrics.com. Include these as parts of your email:
   1. Sample Title: "Congratulations to [Name] for leveling up to [level]".
   2. Name of person who leveled up.
   3. Congratulations-type of message.
   4. New Level.
   5. Summary of his or her best work.
   6. What he or she has done that you think is impressive.
   7. 1-2 sentences containing your advice on how the newly promoted person can advance to the next level.
10. Help manage your team's to-dos and tasks.

1. Decide whether or not a task that a Team Member assigned to oneself, is genuinely completed. If it is, check the To-Do.
2. Grant permission to postpone the due date of a To-Do if the Team Member assigned has provided an adequate set of reasons.
3. Check your team members' To-Do's on Basecamp either by going straight to the project and sifting through the To-Do entries or by clicking on your team member's portrait then selecting "See what's on their plate". You don't need to follow up for lower priority tasks as long as the have higher priority and more urgent tasks.

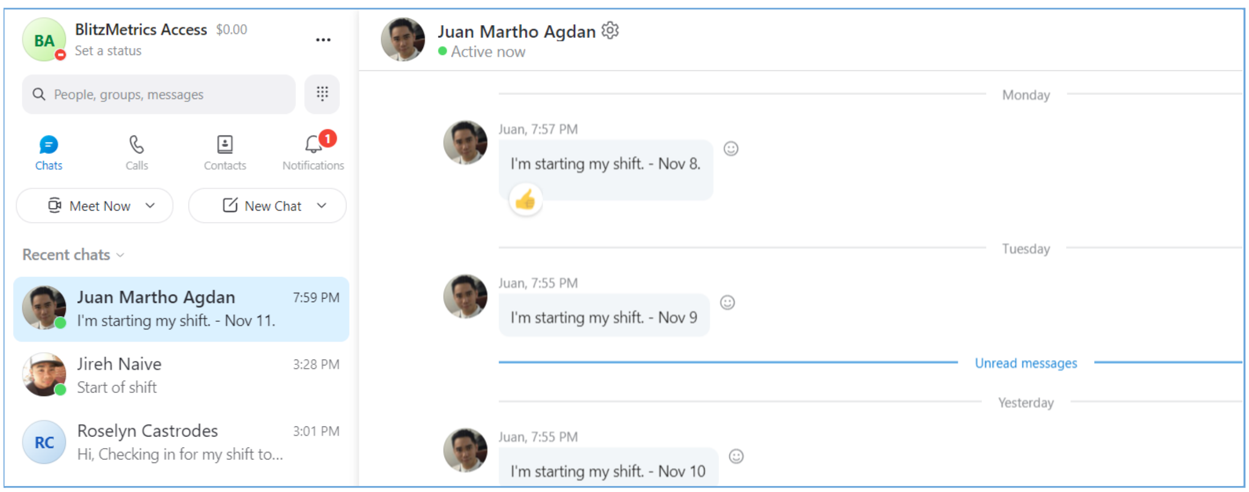
How To Fill In The Start Of Day (SOD) Sheet

If people aren't logging time or are disappearing, but still expecting to be paid for not putting in an honest day's work, then we can assume they are on unpaid leave. And following the steps in our guide, we will de-board them after a certain point.

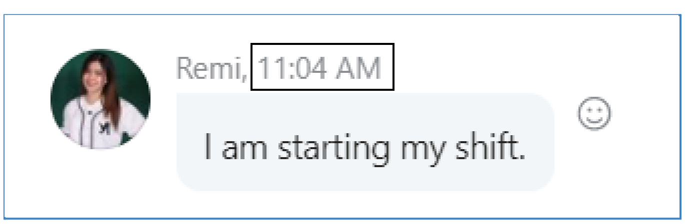
We make sure everyone who joins the team is well-aware of these rules, in case ethically, they don't see an issue with not showing up to work or not letting us know in advance if they have a legitimate reason to ditch projects and clients.

This is especially true of our managers, since if people see us slacking, they know they can, too.

1. Go to [Team Roster]() and find the SOD Submissions tab.
2. Monitor your team members' messages to Skype Name "live:access_268."



3. Check the exact time that they logged in for their shift by seeing the time they have messaged BlitzMetrics Access.

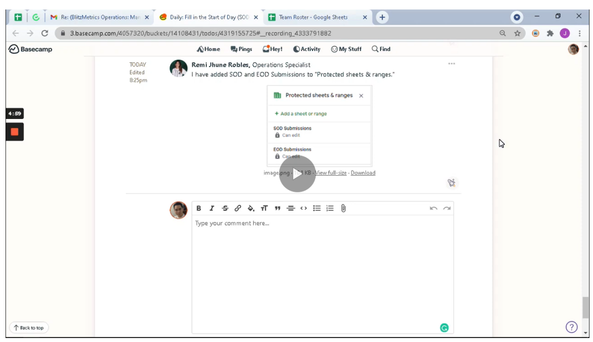


4. Instead of writing down the time, in the SOD tab, write down the difference between expected time and actual time.

Expected time=when the team member started their shift.
Actual time=when they send the Skype message.

Suppose,
If a team member's shift starts at 8:00 PM, and I send the message at 8:00 PM, then write 0:00.
If a team member's shift starts at 8:00 PM, and I send the message at 8:01 PM, then write -0:01.
If a team member's shift starts at 8:00 PM, and I send the message at 7:59 PM, then write 0:01.

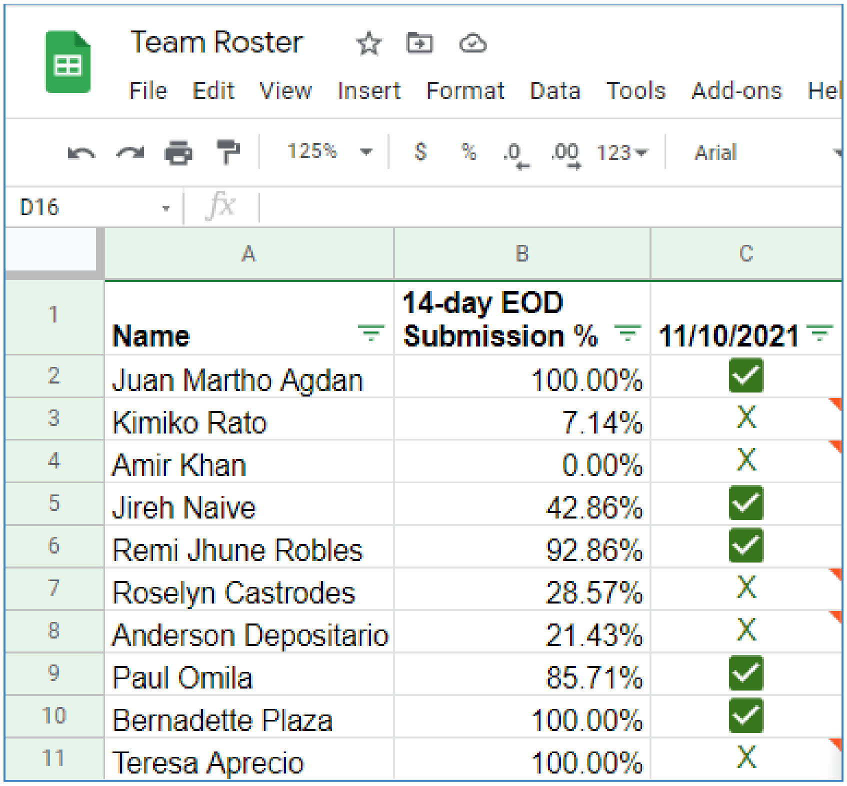
When there is a demonstration of a misunderstanding of what to do, point the team member to the Level 1 Virtual Assistant Guide or Level 1 Specialist Guide.



How To Fill In The Start Of Day (SOD)

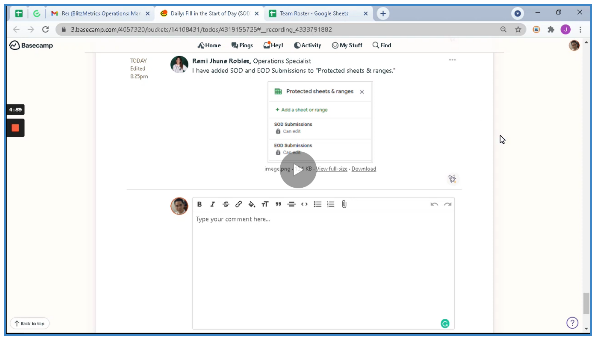
How To Fill In The End Of Day (EOD) Sheet

1. Assume Philippine Timezone. Wait until 5 PM, PHT.
2. Go to Team Roster and find the EOD Submissions tab.
3. Go to the [Basecamp's End Of Day Reports Automatic Check-in]() to check team members' submissions.



	A	B	C
1	Name	14-day EOD Submission %	11/10/2021
2	Juan Martho Agdan	100.00%	✓
3	Kimiko Rato	7.14%	X
4	Amir Khan	0.00%	X
5	Jireh Naive	42.86%	✓
6	Remi Jhune Robles	92.86%	✓
7	Roselyn Castrodes	28.57%	X
8	Anderson Depositario	21.43%	X
9	Paul Omila	85.71%	✓
10	Bernadette Plaza	100.00%	✓
11	Teresa Aprecio	100.00%	X

   a. IF a team member has submitted an EOD update for the previous business day, THEN check the checkbox that corresponds to their name.
   b. IF a team member has not submitted an EOD update for the previous business day, THEN write an "x" on the cell that corresponds to their name.
4. In [LVL1_Daily: Fill in the EOD Submissions sheet](), message those that have not submitted them, tell all of them that they have not written down their EOD update while mentioning their name.
   a. IF a team member has not submitted an EOD update for the previous business day AND has communicated beforehand that they are unavailable to perform tasks on that day, THEN request them to forward you the email that they have used to communicate and the subject line of that email
   b. IF you have received it, THEN write "J" on the cell that corresponds to their name.



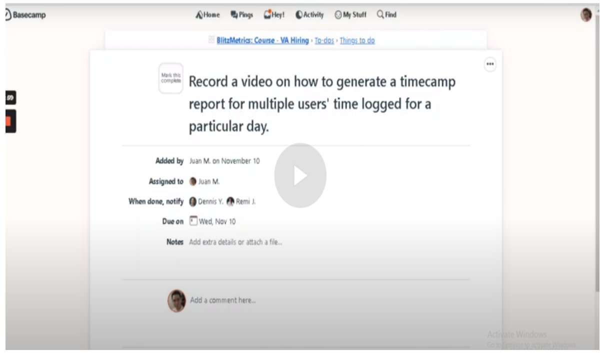
[How To Fill In The Start Of Day (SOD)]

5. IF The team member has not followed the EOD Format in the Level 1 Virtual Assistant Guide, THEN tell them to read the "End Of Day Reports" chapter.

Remarks

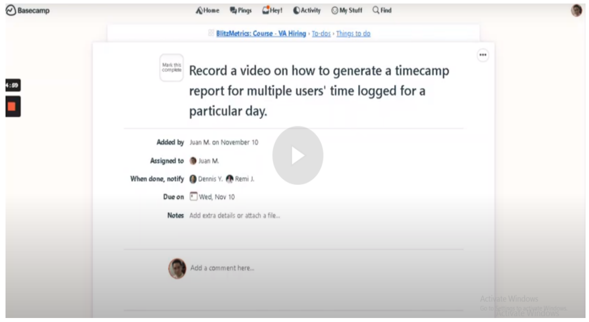
- You have to wait until 5 PM PHT due to time zone differences, i.e. some people may still be working because the day has not yet ended since they are at PST timezone.
- Suppose the day today is August 24, 2021. Then you have to check for August 23, 2021. Not for August 24, 2021. If the current day is Monday, then you check for Friday.

How To Generate A Timecamp Report For Multiple Users' Time Logged For A Particular Day

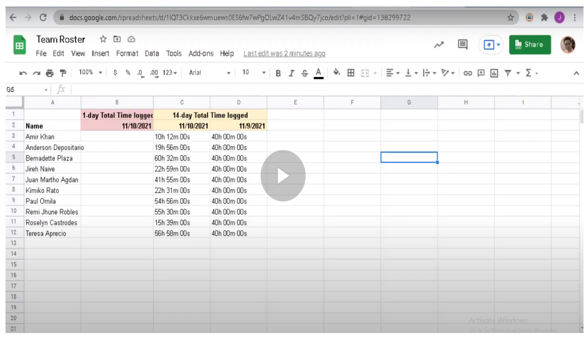


[How To Generate A Timecamp Report For Multiple Users' Time Logged For A Particular Day]

How To Generate TimeCamp Hours And Fill In The Team Roster



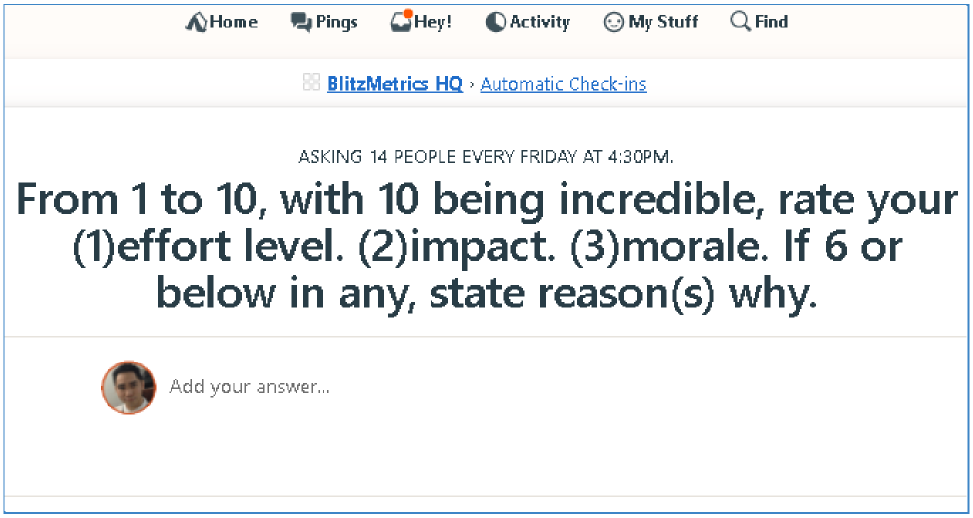
[How To Generate TimeCamp Hours And Fill In The Team Roster Part 1](#)



[How To Generate TimeCamp Hours And Fill In The Team Roster Part 2](#)

Weekly Self Assessments

Once per week on a Thursday at 4:30 PM, we use an Automatic Check-in on one of our Basecamp Projects for internal topics. We ask the following:



If anyone is at 6 or below in any area, we figure out why and what we can do to fix it. What we want to avoid or eliminate are situations like this:

- I'm not being paid enough, so I'm going to slow down work, not work, or put in a less than earnest effort— yet still expect the company to pay 100% for partial efforts.
- I'm continually getting away with working an hour or two a day but billing a whole day. Because I see others able to get away with this, I believe I can, too.
- I've got low morale, so I'm not able to work and don't feel like communicating. I still need money for bills, since my landlord isn't giving me a discount on rent. So I require full payment even though I'm not providing a full effort.

Onboarding Process Checklist

☐ Inform the Financial Specialist or an authorized VA that we hired a new Specialist/VA so they can send Non-Disclosure and Independent Contractor Agreements.

▢ Provide Job Title of the New Hire.

▢ Provide Rate of Pay of New Hire

☐ Team lead extends a welcome.

☐ Create a Google Suite BlitzMetrics Account. Manually add a new hire's account to our Team Drive to ensure.

☐ Create a Basecamp Account. Give initial access to selected projects only. Manually add new people to projects, instead of giving them all projects and having to subtract.

☐ Create a TimeCamp Account.

☐ Grant them Manager Access to YouTube.

☐ Create a Facebook Business Manager Account as an Employee.

☐ Email the Onboarding Asset Links to the new hire.

☐ Request them to log in to our Academy and grant them access to ALL courses.

☐ Add to various Infusionsoft campaigns.

▢ Daily Status Update.

▢ Weekly Team Lead Report.

▢ Quarterly Goals Setting.

▢ 1099 contractor only: Invoice Reminder

Optional:

☐ Create an Infusionsoft Account (ONLY when someone instructs and they have passed the Infusionsoft Basics Course in the BlitzMetrics Academy.

☐ Give them login details to Brand24.

☐ Give them login details to Quuu!

Give them a Boomerang! Pro Account.

Give them an Adobe Account (Premiere Pro, Photoshop, Illustrator).

BlitzNation FB Group (Requires Level 2+ for VAs).

BlitzMetrics Academy Members FB Group.

BlitzMetrics VIP Members FB Group.

Note: Don't use "Junior" in Job Titles because it doesn't look good when interacting with customers.

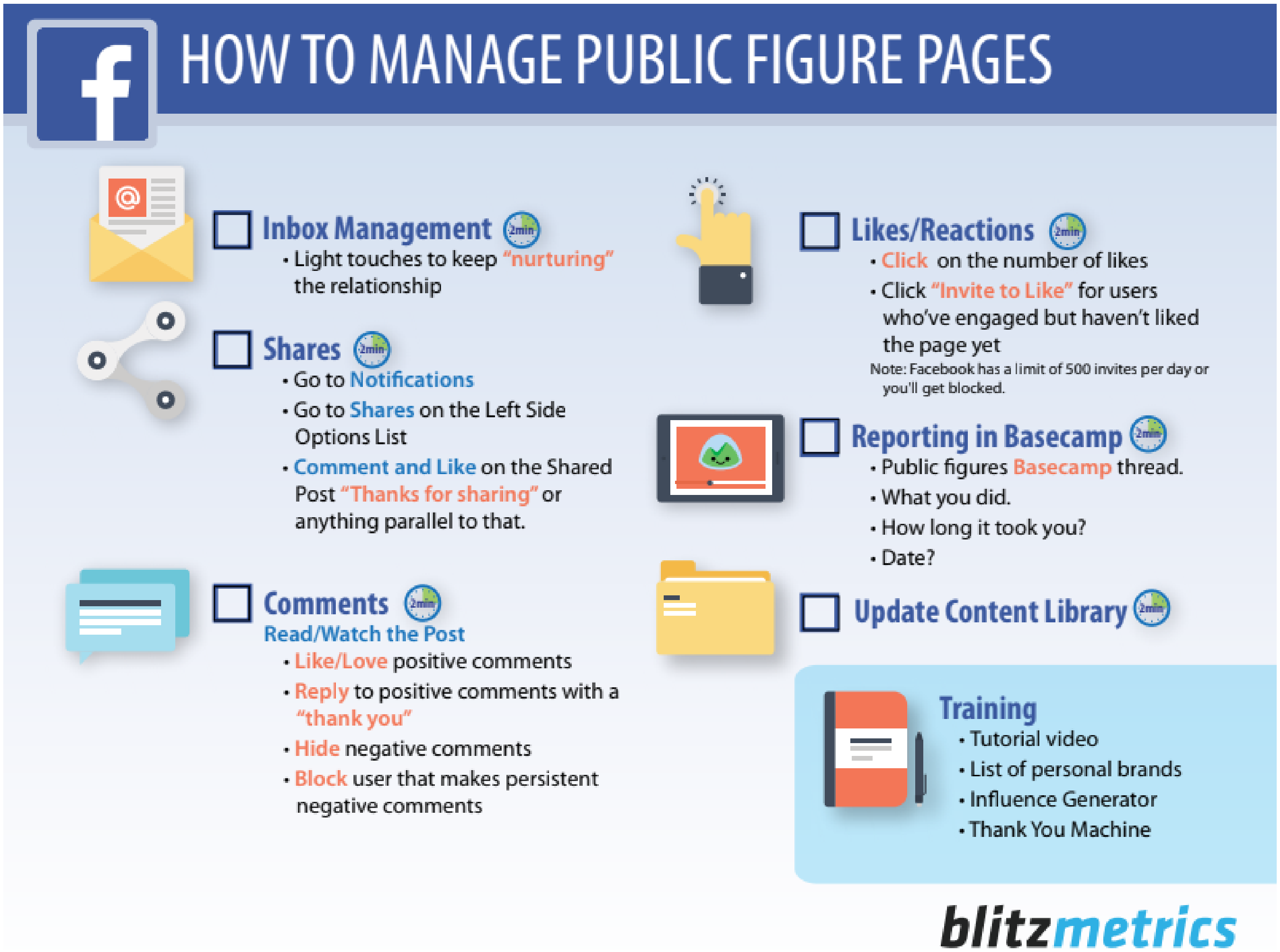
De-boarding Process Checklist

Remove access from the following assets.
Mark N/A if they never had access.

☐ Google Suite
▢ Transfer files to your own drive, then move the folder to the BlitzMetrics Drive under the Ex-employees Drive folder.
☐ Basecamp
☐ Timecamp
▢ Download member's Timecamp report for the remaining dates of employment.
▢ Delete access to Timecamp.
☐ Facebook Business Manager
☐ Facebook Workplace
☐ Infusionsoft
▢ Remove member accounts.
☐ Team Roster
☐ Operations Email List
☐ Academy
☐ YouTube
☐ Boomerang!
☐ Blitzmetrics.com
☐ BlitzNation
☐ BlitzMetrics Academy Members
☐ BlitzMetrics VIP Members
☐ Retrieve company equipment
☐ Remove software subscriptions
☐ Team lead needs to re-assign their current projects/tasks
☐ Notify the Financial Specialist or an authorized VA when someone has been de-boarded so they can remove them from the payroll properly

For Specialists and VAs who left on good terms, maintain access to BlitzMetrics Academy. If they did not leave on good terms, then they do not get any access.

How to manage Public Figure



Things VAs Do To Have Their Applications Eliminated Instantly

1. **Sending out a bunch of canned applications.**
While sending out more applications would appear to generate more interviews, this is not true. Choose just a few job postings that you REALLY like and personalize your response, so they know you wrote a note just for them and have studied their requirements. Though this takes you an extra 30 minutes, it will get you past the 90% of applications that are immediately discarded for being a canned response.

2. **Likewise, make sure your profile is tuned to that type of job.**
If you're a designer, get more specific about what kind of designs you specialize in. If you build websites, what verticals do you have a lot of experience in, so you can do more of the same thing? If you try to say you do everything for everyone, you'll attract bad clients who think a VA can do everything. Clients pay for specialization.

3. **Having negative reviews on onlinejobs.ph.**
Even if the customer is wrong, you'll not want to avoid having them leave negative feedback (yes, this is hard). And you don't want to badmouth a former employer, since the employer considering you will be concerned you'll say the same about them.

4. **Having unprofessional profiles on any channel.**
The employer may look at your photos on social media, so be careful. Assume anything that you post is public. Avoid screen names that are too clever. One promising applicant that we were considering for a designer position had a great portfolio, but his username had "devil" and "666" in it. Rather than risk it, we moved on to hire from the hundreds of other strong designers that didn't have such a risk.

5. **Not smiling.**
They're more likely to hire you if you're smiling--it's that simple. After all, someone you're spending a few hours a day with is someone you want to be pleasant, right?

6. **Skim Reading.**
Use a test in your posting. For example you might ask them to reply using a certain word in the subject line, "use rabbit or facebook ads in the subject line to show you pay attention to details." If they miss, they're out.

7. **Being too proud.**

8. **Impatience.**

9. **Incomplete Submissions.**

How To Assess VA Efficiency

1. Determine the following:

VA cost per hour
•VA hours worked per day
•VA tasks completed per day
2. Solve the equation

(VA cost per hour x VA hours worked per day) ÷ VA tasks completed per day

Example 1:

If a VA completes 10 tasks, works 8 hours per day and you pay the VA $10 per hour, then
Efficiency = (VA cost per hour x VA hours worked per day) ÷ VA tasks completed per day
= (10 per hour x 8 hours worked per day) ÷ 10 tasks

= 80 ÷ 10
= 8
Therefore, that task's cost is $8 per task if that VA works on that type of task.

Example 2:

If a VA completes 40 tasks, works 8 hours per day and you pay the VA $10 per hour, then
Efficiency =(VA cost per hour x VA hours worked per day) ÷ VA tasks completed per day
= (10 per hour x 8 hours worked per day) ÷ 40 tasks
= 80 ÷ 40

Therefore, that task's cost is $2 per task if that VA works on that type of task.

How To Assess VA Effectiveness

Gather reviews via a 5-star system from your clients or managers.

Appendix

Email Templates And Canned Notes

The following are email templates or canned notes that you can use in a variety of situations related to the hiring process, making job posts, sending polite declines and more. You can copy and paste text in-between quotation marks without including the quotation marks.

Look Back At The Job Post

"

Hey, [Name]

We've sprinkled a couple of little details in our job post to automatically disqualify those that didn't include them.

We do this because we receive hundreds of applicants and we want people to stand out!

How will YOU stand out among the rest? You have potential and I want to see you succeed.

Can you look back at the job post and see what details you missed?

We're a family here and we want YOU to be part of it.

Want to give it another look?

Thank you!

"

Disqualification Email

"

Hello [Applicant Name],

As you already know, we've had countless applicants. You are one of the amazing candidates and we wish we could hire everyone.

We're a family at BlitzMetrics and we want to include as many people as possible but our training program isn't at the level where we'll be able to help you get to the level of success we both want you to achieve.

You don't meet the qualifications right now, but if you study up and complete the requirements, you could be employed by us later.

Want to keep training up, so you can get work now as a freelancer, start your agency, or join us when you're qualified? Let us know which course in the BlitzMetrics Academy you would like to take that's $200 or less and we'll give it to you for free.

I want you to succeed. We want you to succeed!

Thank you!

"

Qualifying To The Next Round

"

Hey, [Applicant Name].

[Personalized note]

Congratulations on qualifying to the next round.

First, for you to understand what we do as a company, please go to blitzmetrics.com and understand what we do.

Make a video recording of yourself that's no more than 4 minutes about your insights on what we do and on how you can make the website better with your role.

Second, for you to get a better understanding of your role, please watch a video based on the position that you are applying for and create a 1-page summary.

We're only looking to seek your understanding of the role and to see your English comprehension and writing skills.

Place your summary in a viewable Google Document or any type of documents such as a PDF, jpeg, or even a screenshot. You can place watermarks if you want to make sure the document is not transferable.

Pick only 1:

- Operations VA: 7:40 to 32:35 of "23Dec2020 - PMC - Dennis Yu & Tristan Parmley".
- Community Manager VA: 7:40 to 32:35 of "23Dec2020 - PMC - Dennis Yu & Tristan Parmley".
- Video Editor VA "25Jan2021 - PDC - Dennis Yu (Content Specialist & Video Editor)".
- Content Writer VA "25Jan2021 - PDC - Dennis Yu (Content Specialist & Video Editor)"
- Google Ads VA 32:34 to 58:00 "23Dec2020 - PMC - Dennis Yu & Tristan Parmley"
- Designer VA "29Jan2021 - PDC - Dennis Yu (Instructional Design VA & Operations VA)"
- Process Development VA "29Jan2021 - PDC - Dennis Yu (Instructional Design VA & Operations VA)"
- WordPress Developer VA "Internal - Blitzmetrics Logic Engine (Filmed at SMADCON 2018)"
- Project Management VA "Rehan Allahwala - Digital Marketing with Dennis".

"

Content Specialist Test Task

"

Hey, [Name]

We have looked into your portfolio and we believe our training program isn't at the level where we'll be able to help you get to the level of success we both want you to achieve.

Your portfolio does not quite meet the qualifications right now however, if you would like, you can take a 5-10 minute test task to see if you fit in a role where you use a copywriting tool.

We'd like you to demonstrate how well you can create a blog post using this tool.

[Insert Jarvis Instructions here]

Place your summary in a viewable Google Document or any type of document such as a PDF, jpeg or even a screenshot. You can place water marks if you want to make sure the document is not transferable.

"

Interview Phase

“

Hey, [Applicant Name].

Congratulations on making it all the way to the interview phase. The last phase is the interview stage.

It’s a two-step process: First, you will have two interviews.

But before all that, we’d like you to make your own goals sheet and professional development plan.

In completing your Goals Sheet, please refer to this video and use the attached excel file as your template. (attach excel file in your email)
https://www.youtube.com/watch?v=me8oKGKLSbY

Let’s face it, most of us suck at goal setting.

You have to break free from this cycle.

Most people don’t properly identify the reason they aren’t meeting their goals and blame themselves for their lack of goal execution.

Rule #1: Don’t blame yourself.

It’s (most likely) not your fault. Don’t get me wrong, executing your goals is important, but the foundation is even more important.

“Even a tower a hundred yards tall has still its foundations on the ground“. – Chinese Proverb

Rule #2: Listen to Chinese proverbs.

No matter how big or small our goals may be, we need to make sure they’re smart. Well, S.M.A.R.T.

S: Specific – None of that “I want to be a better employee” or “I want to exercise” genericism.

You want to be a better employee? In what way? Try, “I want to turn in my reports on-time”.

You want to exercise? Exercise what? Try, “I want to run a marathon”.

M: Measurable – Now that we have specific goals, we need to make sure we can measure our progress and success.

For our first example, we’d take “I want to turn in my reports on-time” and add the phrase “98% of the time” to the end of it.

In the next example, we’d take “I want to run a marathon” and add the phrase “in under four and a half hours” to the end of it.

A: Achievable – We need to find the sweet spot between goals that are too easy and goals that are too hard.

Goals that are too easy don't challenge you. A good rule of thumb – if your goal doesn't require at least three steps to achieve, it's too easy.

If you set a goal to do 50 push-ups, and you did 49 today, the only step is to do one more push-up. Too easy.

On the flip side, you don't want to have a goal that's too hard.

There are a few results that come from setting goals that are too difficult:

You get frustrated because you're making so little progress

You lose interest in the goal because it seems so far away

You just flat out give up because it seems like such a huge task

This why we have to make sure our goals are achievable.

Find a good middle ground — a goal that is challenging, but doesn't seem unreachable.

For example, don't set a goal to run a marathon by September 1st if it's the middle of August and you can barely run a half marathon (even though that's still impressive).

R: Relevant – Set goals that you actually want to accomplish.

Most of us can remember a time in grade school that we received an assignment we really had no interest in. It wasn't relevant to us. As a result, we didn't take it seriously and most likely didn't do as well on it as we could have.

I've been guilty of this many times.

If you set goals that are relevant to your interests, you'll be way more likely to follow-through and achieve them.

T: Time-oriented – Give yourself a deadline that you can stick to.

Procrastination is toxic.

Set a date and make incremental progress until you've achieved your goal.

Rule #3: Write it down.

THIS IS IMPORTANT. Do NOT take this rule lightly.

Refer to this regarding your Development Plan:

https://youtu.be/HbwCbdxCt_Q

Linked are the templates for both the Goals Sheet and a sample Development Plan (the development plan is only a sample. Place values in the table based on your assessment, your job experience, and details in the corresponding job post):

https://www.dropbox.com/sh/lh0pkkvb8cqq49e/AAAVcQ2CrRMBNrV4m5YhfO7za?dl=0

Lastly, please put your perceived strengths and weaknesses (3 each), as well as what 3 skills you already are good at and 3 skills you would like to learn.

Compile all your prior submissions into one PDF document if applicable:

video links
onlinejobs.ph profile link
Resume
portfolio
Goals Sheet
Development Plan
Perceived Strengths/Weaknesses
3 Skills You Are Good At and 3 Skills You Would Like to Learn
"

Progress Through Our Leveling System

"

Hey, [Name].

[Personalized Note]
Given your stated starting point in your Development Plan, the expectation is that you can start off with already specialized and diversified skills we need without needing any sort of training or adjustment period.

At the moment, although we appreciate your background - we do not believe you to be at that level and on par with current VA's at that level. See the Virtual Assistant Career Path below:

You can however level down your expectations and choose to progress through our leveling system. Of course, if you are a long-term player and truly believe in your competence, then you should be able to advance through the levels quickly - we have VA's that advanced through levels in a matter of 4 weeks.

What do you think?
“

Scheduling The Interview

"
Hello, everyone!

I'm the [YourJobTitle] for BlitzMetrics and I will conduct your interview.

Are you available for an interview at [TimeDateAndTimezone]?

Please do the following:

1. Reply to all with your Skype name.
2. Reply to all with your Zoom email address.
3. Add me on Skype "[YourSkypeUsername]" without quotation marks.
4. Add me on Zoom "[YourZoomEmailAddress]" without quotation marks.

Before you join the zoom meeting, please

1. Prepare your webcam, or phone camera, and have the video on during the interview.
2. Install Zoom on your PC or mobile device.
3. Test your audio hardware e.g. mic, speakers, or headset.

--

For questions, please view

1. https://blitzmetrics.com/jobs/
2. https://blitzmetrics.com/welcome-va/

--

[ZoomInvitation]
"

VA Bonus

[FirstName],

The BlitzMetrics team believes that you have been a valuable member of the team and have made a large positive impact on our mission. You have enabled the team to generate enough value for our community, and have helped the company achieve substantial financial health.

As you know, BlitzMetrics is a performance company in every way, and we believe that high performance leads to higher earnings.
So as a recognition of your contribution, we are happy to have rewarded you with a bonus in addition to our regular invoice fund transfers.

[ScreenshotOfStats]

We have calculated your bonus by using, but not limited to, the following factors:

1. Your level.
2. Your billable hours.
3. Your work performance.
4. Your punctuality.
5. Your communication's consistency.
6. Your duration of stay.

Please note that we do not guarantee any future bonuses, however, we are looking forward to granting you a larger bonus once you have demonstrated large improvements.

We encourage you to continue to bring value through timely communication, consistent execution of your tasks, and reliably display the qualities of the 9 triangles.

Thank you for your continued dedication.

Pending Process Updates

Below is a list of guides that a process specialist should incorporate to this Google Document. We have a “Pending Process Updates” chapter so our teammates can view the “raw” version before we incorporate or synthesize the information to the guide as a whole.

---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Thu, Jun 3, 2021 at 8:42 PM
Subject: Re: Process Guides and Maps
To: Sean Musallam <sean.musallam@blitzmetrics.com>
Cc: Kristen Gerzin <kristen@blitzmetrics.com>, Tucker Monheimer <tucker.monheimer@blitzmetrics.com>, Chris Lamb <chrisl@blitzmetrics.com>, Daniel Pasker <daniel.pasker@blitzmetrics.com>, Juan Agdan <juan.agdan@blitzmetrics.com>

The good news is that there's no need for the VAs to prioritize.
Look at how much work is being done (almost nothing) by an army of folks.
The level of effort to chase is a multiple of what it takes to actually do any particular task.

So instead of worrying about prioritization for VAs (which is shifting uneaten veggies on the plate), let's make sure they follow Level 1 (#DDD) which is reliably responding and executing, instead of ignoring, pusing off to later, or requiring our intervention at every step.

As I explained in the other thread just now, the issue is lack of execution, which creates build-up and more work for us as managers and owners to then have to micro-manage. I will continue to emergency rescue for now while we get higher quality people in place-- workers and managers.

Meanwhile, you can see how I'm chasing threads for months that are ignored-- not okay to ignore, for many reasons.
Thank goodness, we have reliable and competent folks like Juan who are getting stuff done and asking questions where he needs clarity-- instead of waiting for us to chase him down and play 20 questions to try to figure out what's happening.

Look at the initiative that Kristen and Tucker are showing as business leaders, which is way beyond what we'd expect from VAs.
Consider the 3 levels of working in the factory that I described earlier in detail-- the factory worker, the manager, and the owner/architect.

The mistake we want to avoid here is turning owners into VAs that have to micro-manage communication at each step of a task-- to explain why reliability is so important.
When things build up, we lose track, forget what happened months ago, need to "prioritize", lose moral, lose clients, etc...

When not much working is getting done (and no communication asking for help), work stacks up-- creating a false "too busy" or prioritization issue.
Hence, people quality and management (not babysitting) is so key.

Study these 3 classic articles to see how to overcome a problem that all other companies have already solved:

https://blitzmetrics.com/dont-make-chase/
https://dennis-yu.com/2015/05/28/the-hidden-reason-why-you-are-failing/
https://www.linkedin.com/pulse/hidden-most-obvious-reason-your-campaigns-failing-dennis-yu/

If people don't understand or are not willing to adhere to Level 1 (#DDD), they can't proceed to Level 2 (#CID-- team work).

And if they don't understand or want to apply Level 2 principles, no way they can move to Level 3 (#MAA-- optimization), etc...

A few high quality people will get more done than an army of low and medium quality people.

On Thu, Jun 3, 2021 at 10:14 AM Sean Musallam <sean.musallam@blitzmetrics.com> wrote:

Dennis,

I understand and I agree. I am working with the VA's and I believe they are showing improvement.

I want to clarify a few points:

1) I agree we need more people applying these processes so we can broaden our cognizance and have more people who can update processes. I have yet to get clear on who has training and experience with the different material. The skills tracker seems to be mostly empty now though an image I saw of it, it had tons of info before. I will work to recreate this. It's going to take some time to get this going. In the meantime I'll be asking people where and how they can help.

2) There are quite a few emails in your boomerang orbit that you are sending to the managers and the VA's looking for them to pick it up and revive it. I have a few comments on this topic:

   a. The VA's do not have the ability to prioritize their work. They have tasks coming to them from 2-4 people so they become unclear, things get clogged up, and they pull away out of fear of embarrassment. We aren't setting them up to be successful, nor us managers. Having high level priorities agreed to by everyone is going to be paramount in getting us through this.

   For example, yesterday I discovered that Zek has been spending a lot of his time working on preparing 25 Office Hours videos for the Academy. It's 4-5 days of work. Since he thinks that is his priority, he didn't jump on the other emails he has. And he doesn't work on the course that I told him to work on. In my opinion, our primary courses must take precedence. We're selling courses and they need to be QA'd. The short videos should wait until we have at least our first 3-4 courses updated. But I believe you assigned him the work for the Office Hours videos and I don't want to step on your toes. I know you want me to be empowered, but at the end of the day it's your company and you're the boss. I don't want to override the work you give to people. We need to find a way we can work together. If we can all be in agreement of the priorities then we can assign new work and know where it fits amongst our critical work.

   b. We need a plan to address all of the emails you have in your boomerang orbit and the loose threads in BC you want us to revive. They need to be consciously prioritized amongst the courses and documentation updates we've agreed to. If a thread hasn't been touched in 4 months and it's not tied to a client need nor the course we are in the process of updating, I think we need to leave them where they are.
   We need to keep the VA's busy, but until we improve their cognizance and reliability, if we give them too much we start working backward. Let's focus on the clients, courses, documentation, trackers, and some VA training. Once we get some of this work behind us let's restart some of these other projects. I will be happy to take the emails from you and get them into BC.

This is obviously complex because there are many different people with different levels of training, different cognizance, etc. Someone can go through the priorities like an IF statement, they go down the list of priorities until they find one that is applicable.

In the BlitzMetrics HQ project I could post an active (live updates) priorities report that we can reference. I don't know if it will be useful but at least it makes priorities part of the conversation.

On Fri, May 28, 2021 at 7:31 PM Dennis Yu <dennis@blitzmetrics.com> wrote:

Sean-- good analysis.

I want you and the other P&L owners to consider there are 3 levels of understanding:

- the **factory worker** who does just their role in the process (put the front left tire on the Ford Explorer) and doesn't need to understand much beyond it, except to make them feel part of a larger mission. Level 1-3.
- the **manager** who understands how to do a few factory roles, overseeing a section of the factory--- in this case, being in charge of a function, product, or team, but not having strategy level skill. Level 4-6.
- the **architect** who understands the whole picture and can orchestrate operations, software, branding, financial planning, and deal-making. Levels 7-9.

If we attempt to teach a factory worker management or strategy, they will be confused.
If we attempt to teach a manager the larger picture, they will become overwhelmed.

To be successful in this ecosystem, requires that people move up through the levels-- especially a P&L owner (entrepreneur).
Skipping levels leads to problems.

Same for attempting to teach ahead of learning and doing first-- which is why courses is our pain point right now.
We need more practitioners who are willing to learn, do, and teach from experience-- which is to document what they're doing along the way.

Right now, incredibly, the bulk of the content (courses, training, webinars, articles, posts) is produced by just one person who does it only a couple hours a day.
Imagine if we could get folks to focus on their appropriate level, so then we can pull in other figureheads to produce content, too.
We'd get 100X our power easily, which drives sales of courses and packages.

We have a large team relative to the amount of work being done.
Same for the meager level of communication-- which is just a few messages a day, often punctuated by days of silence (for our VAs, not for our P&L business owners).
If we had just a few solid, productive VAs, we'd do more than a bunch of folks who eat up our time in chasing and explaining-- a double whammy.

The "weakest link" issue we discussed a few weeks ago injures us badly when the VA in charge of the Ops Tracker doesn't update the Team Roster, Project Tracker, or other documents-- creating a cascading waterfall of problems. The key is simply getting a few managers (who we have now), who can do daily check-ins, ensure each VA is feeling good, ensure we have frequent/lightweight touches with clients, and other standard operational processes that all companies have and can expect their people to follow.

I see Sean as the glue here-- taking the right steps and making sure people are in the exact role, governed by the exact process outlined in the Operations Process Guide.

More specifically, because we're bootstrapping to a framework of many local service agencies selling the same package, we need to take care of clients first, which helps us document what we do into courses. The SAE is what we've always taught and been implementing, which breaks into the subcomponents into roughly the priority you've listed.

You'll not need to understand everything in order to take action (which creates paralysis)-- but that also doesn't mean we can skip steps in the leveling system.

Once the documents are finally back in order-- tracking what others intentionally or unintentionally deleted or messed up-- we'll be doing great.
Juan was doing great at this for a while-- but inconsistency creates ricochet damage-- same for others, as you can see.

On Fri, May 28, 2021 at 9:18 AM Sean Musallam <sean.musallam@blitzmetrics.com> wrote:

Hi Dennis,

I got this email from Kristen since you sent it before I started at Blitz. She thought that I would be the right place to park this project. I think this is the right time to discuss priorities.

At this point, we have a team that is feeling pulled in too many directions which causes churn and confusion. We need to have an organizational priority that we can use as a North star to keep us moving.

Priorities on a high level: (my view)
1) Support our clients - The project managers are carrying this with the help of the VA's
2) Clean up membership clients and convert complementary to paying. Create the automation to support this system. - Carried by Mel and myself
3A) Course updates - For each course, we would update the course, then the guides, then the presentations, then the micros, then the checklists, Blitz page, other landing page, Infusionsoft. After that, we start on the next course. That way we'll have a full suite of clean material.
3B) Clean up the Operations Process Guide and create the Operations Tracker - Carried by Mel and myself
3C) Cleaning up trackers - Carried by the managers, Mel, and myself
3D) BC and Drive organization

I feel that point 3 is our pain point. We have an ocean boiling issue where the task is too large for anyone to see the way. Between all the threads in BC plus the older tasks you're resurrecting from email, the team isn't operational enough to handle this volume of work in parallel. We can likely handle 2-3 docs at the same time while they are different phases with people of different cognizance.

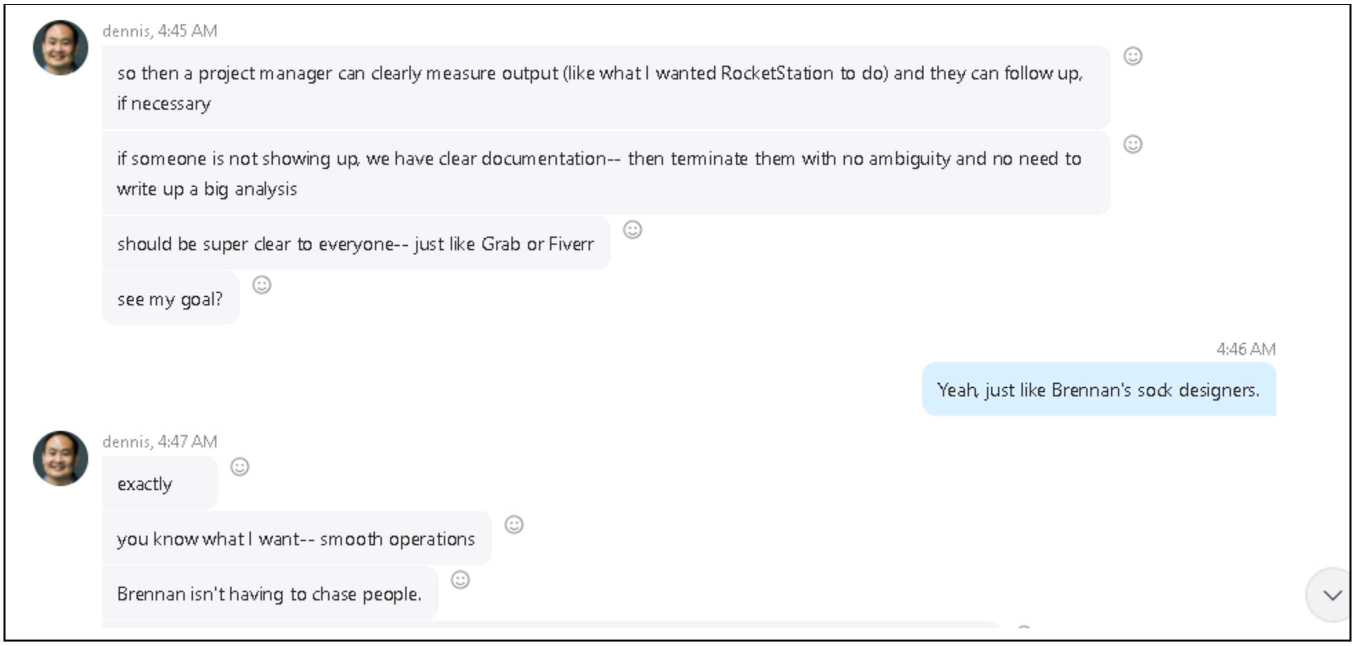
Course priority: (each one will have updates to every form of it listed in 3A above)
1) FDD
2) One Minute Video
3) 9 Triangles
4) SAE
5) Personal Branding
6) Digital Plumbing
7) Content Marketing

8) Course Builder Course
9) Reassess remaining courses and all of the projects in the emails you have.

My message to the team would be the following:
1) Focus on client satisfactions. Keep our clients happy.
2) We are updating courses in the order depicted. This work gets trumped by client work, however, there must be communication about competing priorities. If you've worked these processes before, your support is requested. While we are waiting for reviews and updates we'll also work on the Ops Process Manual and Operations Tracker.
3) Clean up trackers as we go. When we have a need, we'll pause, update the sheet/tracker, then move on
4) Cleaning and organization needs to be a way of life. Clean as we go. We'll have a team meeting to discuss how we want to organize so as we go through each course we will organize all threads and drive locations.
5) Other projects that need to be taken care of will get parked in 1 project folder in BC and a primary folder in the Drive. As we progress, we will resurrect the project and put it into the right thread location to work on it. Also, if they are related to a course, we can of course wrap them in. If a project comes up with a higher priority we'll adjust as we go.

I cannot see the entire scope of this business after 3 weeks. So, I am looking for your feedback. How can we adjust this plan to address what is truly most important? Other ideas?

Dennis' Skype message on Nov 15, 2021



---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Tue, Nov 9, 2021 at 2:42 AM
Subject: Fwd: Rocket Station x ChiroRevenue Status Update
To: Juan Agdan <juan.agdan@blitzmetrics.com>

---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Mon, Mar 22, 2021 at 2:00 PM
Subject: Fwd: Rocket Station x ChiroRevenue Status Update
To: Robert Nickell <rob@rocketstation.com>, Greg Brooks <greg@rocketstation.com>, Tristan Parmley <tristan@chirorevenue.com>, Marc Nickell <marc@rocketstation.com>, Juan Martho Agdan <juan@chirorevenue.com>

I've already spelled out the answer here on how to troubleshoot when output is low-- in a detailed, step-by-step note and in a few coaching calls.
The Operations Process we've shared all along also shows how to measure and troubleshoot output.

To say that the VAs believe things are great (because we are encouraging them) is to sidestep the management issue, processes, and standards that we've set.

We're happy to have more of these calls, as Taylor suggests. However, Tristan's response here has been that these probably won't be helpful, since we've had so many before covering the same issue each time. We need a management layer at RS that is willing to understand our concerns and is capable of actioning.

We're still waiting for some sort of active acknowledgement of the points we've been making all along.
I know Taylor didn't get involved until a few days ago-- and my hope is that it's not too late to get going, even though she thought she could skim by in the earlier meetings. Or that any of these responses representing RocketStation are even close to sufficient in understanding the issues and taking smart action to remedy.

Nothing personal-- this is a common differentiator between owners and part-time employees.
We want you guys to be a killer partner that we laud publicly everywhere and often-- not a "nightmare client" to "deal with".

---------- Forwarded message ---------
From: **TAYLOR GNAZZO** <taylor@rocketstation.com>
Date: Mon, Mar 22, 2021 at 12:10 PM
Subject: Re: Rocket Station x ChiroRevenue Status Update
To: Tristan Parmley <tristan@chirorevenue.com>, Dennis Yu <dennis@blitzmetrics.com>, Greg Brooks <greg@rocketstation.com>, Marc Nickell <marc@rocketstation.com>
Cc: Nina Katlyn Sta. Ana <nstaana@rocketstation.com>, Jojo Lopez <jlopez@rocketstation.com>, Jeck Amodo <jamodo@rocketstation.com>, Mina Austria <maustria@rocketstation.com>

Hi Team,

Thank you for sharing the response, and Juan, for your insight as well (everyone on the ChiroRevenue team should feel encouraged to provide us with feedback).

In regards to metrics, we identified the following in the KPI breakdown: (1) occupancy and (2) task completion, and (3) AHT. Are there additional metrics you would like us to utilize in evaluating the team's productivity?

In terms of output & our goal of 30 tasks per day, one of the reasons we're not on the same page is because the VA's are receiving positive feedback from their Queue Managers, and thus feel they do not have anything they currently need assistance on.

For example, Odessy is told she is "doing a good job", such that her QM cannot keep up with QA because she's done so many tasks. Patrick is told that his personal daily goal is 20 tasks per day. It will be helpful for all team members to be on the same page and will push our team to speak up if they know they are in fact not meeting expectations. We want to ensure our management isn't causing confusion with the VA's based on internal feedback the queue managers provide.

With the new task template, am I correct that we (all queue managers and all VA's) consider a "task" to be the overarching list (numbered 1-5) and NOT the bulleted mini-tasks underneath them? Please refer to the below example (the same screenshot Jojo shared last week). Please also have me added to the team@chirorevenue.com list for visibility purposes.

2. B Dr Hillary Hushower Carmel IN - Rangeline Chiropractic
    - Create Clients Google Drive Note
    - Duplicate Content Library & Positive Mentions Note
    - Duplicate TEAM Tracker Template Note
    - Run A SnapShot Report and Add It Into The Team Tracker Note
    - Create Client a GHL account on app.chirorevenue.com
    - Create Client's SEM Rush Project Note
3. B Dr Jesse Lang/Liz Mooney Shorewood IL - Shorewood Elite Healthcare
    - Create Clients Google Drive Note
    - Duplicate Content Library & Positive Mentions Note
    - Duplicate TEAM Tracker Template Note
    - Run A SnapShot Report and Add It Into The Team Tracker Note
    - Create Client a GHL account on app.chirorevenue.com
    - Create Client's SEM Rush Project Note
4. B Dr Katie Sleigh Arlington Heights IL - Sleigh Family Chiropractic
    - Create Clients Google Drive Note
    - Duplicate Content Library & Positive Mentions Note
    - Duplicate TEAM Tracker Template Note
    - Run A SnapShot Report and Add It Into The Team Tracker Note
    - Create Client a GHL account on app.chirorevenue.com
    - Create Client's SEM Rush Project Note
5. B Dr Mike Geran Travelers Rest SC - Foothills Chiropractic
    - Create Clients Google Drive Note
    - Duplicate Content Library & Positive Mentions Note
    - Duplicate TEAM Tracker Template Note
    - Run A SnapShot Report and Add It Into The Team Tracker Note
    - Create Client a GHL account on app.chirorevenue.com

Additionally, our 30-minute coaching sessions are not task-specific. We utilize this time for our managers to build a relationship with their VA's, to prevent turnover, and to address any and all non-task-specific concerns.

We provide feedback in relation to the KPIs identified above, which is required in holding our team accountable. It is one of the reasons we see a less than 4% rate of turnover company-wide.

If you do not want the VA's pulled that is absolutely ok, but this is a practice built into our internal management process that we have seen great success with across all clients. These sessions ensure complete assessment and a structured plan of action across the team to ensure we win with proper communication.

On Wed, Mar 17, 2021 at 5:07 PM TAYLOR GNAZZO <taylor@rocketstation.com> wrote:

Hi Team!

Please see below for our team's next steps to ensure we meet your metrics, analysis, and action expectations. The following points will help us track inefficiency, equip Jojo to take on the day-to-day management, prevent missteps or miscommunications, and relay information in real-time.

1) Coaching Sessions

- Jojo pulls each VA out once every-other-week for a 30-minute coaching session. During this time, Jojo discusses VA performance, areas of improvement, team and VA wins, updates from Rocket Station and/or ChiroRevenue, questions/concerns from the VA, etc.
- If Jojo identifies a red flag/area of improvement during his day-to-day check-ins, he will pull the VA for a coaching session in real-time.
- Please confirm if you are OK with the coaching process above. We can also provide you with a coaching schedule so you know exactly which VA is removed from the queue at any given point in time if that is helpful. We will also notate any coaching sessions that took place on the EOD report (see below).

2) KPI's

- We will utilize the below KPI's in measuring VA success. If there are any additional metrics you would like us to utilize, or change any of the below, please let us know.

Key Performance Indicators			
Metric	Description	< 6 WK Goal	> 6 WK Goal
Tasks Completed / Hour	The total number of tasks completed per VA per hour.	3-4	6-7
Tasks Completed / Day	The total number of tasks completed per VA per day.	30	50
Task Occupancy	The total time spent working on tasks.	80%	80%
AHT	The average time it takes to complete one task.	15 minutes	10 minutes

3) EOD/EOW Report

- Please see below for a sample EOD/EOW report. If there is anything you would like adjusted or added, please let us know.
- At every start of a shift, Jojo will email you an EOD report from the shift prior.
- You will also receive an EOW report following the same format.
- Email Subject Format: WORKLOAD EOD_DATE

ROCKET STATION X CHIROREVENUE EOD REPORT (DATE)						
VA PERFORMANCE						
KPI	VA NAME 1	VA NAME 2	VA NAME 3	VA NAME 4	VA NAME 5	TEAM AVERAGE
Daily Attendance						
Total Tasks Completed						
Task Occupancy						
Average Handle Time						
HELP NEEDED						
Any help/requests from Rocket Station to ChiroRevenue.						
AREAS OF IMRPOVEMENT/RED FLAGS						
Any areas of improvement noticed throughout the day and a small explanation of solution. EX: One VA's task occupancy dropped to 60%, coaching completed & continued monitoring throughout the day.						
COACHING SESSSIONS						
For visibility, list any coaching sessions VA's were pulled out for. List VA Name and time of session.						
VA/TEAM SUCCESSES						
All VA/Team successes for the day.						

4) Rocket Station Schedules

- **Jojo:** Monday-Friday, 8 AM - 5 PM CST
- **Nina:** Monday-Friday, 7 AM - 4 PM CST
- **Taylor:** Monday-Friday, 9 AM - 1 PM CST

5) Rocket Station Roles

- **Jojo:** You and your VA's main POC at Rocket Station. Liaison between operations and the day-to-day management of your VA's. Any red flags, questions, or celebrations regarding your VA's can be fielded directly through Jojo.
- Any new hire, replacement, or termination requests should be fielded through Jojo, who will then communicate with the Placements Team (Mina).
- Any process document update requests should be fielded through Jojo, who will then communicate with the Process Development Team (Jeck/Kazel) and Nina and/or Taylor, if necessary.
- **Nina:** High-level operations POC here to support Jojo. Please CC Nina on all communications with Jojo.
- **Taylor:** High-level operations POC. If at any time you are not satisfied with the structure or process in which we are operating, or need to have a high-level conversation in regards to your team, Taylor will act as your main POC. Liaison between PH and US Operations. Please CC Taylor on all communications with Nina.

6) Day-to-Day VA Management

- Jojo will utilize TimeCamp to monitor VA productivity in real-time. The expectation is that Jojo will check on the team at least three times per day, plus consistent monitoring via real-time chat.
- If a VA is not meeting expectations Jojo will reach out directly to the VA to identify the problem and a plan of action.
- If the issue is manageable without assistance from a ChiroRevenue POC, Jojo will take the necessary actions and notate the event on the EOD report.
- If the issue requires assistance from a ChiroRevenue POC, or Jojo identifies it as something that ChiroRevenue needs to be made aware of in real-time, he will reach out directly to Tristan (or another identified POC, please confirm).

- Any common areas of concern/patterned struggles will be notated for further exploration & incorporation into process documentation (see RS PRODUCTIVITY TAB on QUEUE TRACKER).

7) For Discussion

- Identify a process of accountability on all process document-related pieces (EX: 1,000 Task Library).
- VA's are expected to reach Level 3 within six weeks (one level increase every two weeks). Currently, level progression is determined by VA performance and a solid understanding of the tasks performed at the current VA level. Who will determine level progression? Is this something Rocket Station needs to track/manage?
- Infusionsoft update.
- The Process Development team is awaiting finalized master guides for modules 7-12 (Juan is on it, just including here as a reminder)./

---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Mon, Jan 11, 2021 at 1:36 PM

Subject: Time to tune up our HIRING process!

At one point we had our hiring funnels for VAs and specialists working quite nicely in Infusionsoft, bringing in specialists (now account managers) and VAs through our 3 phase qualifying system.

We were training them along the way to be able to work on any digital marketing client-- not just chiropractors.

Who can take ownership technically of this system to ensure it's running smoothly?
It's worth at least $8/hour and even as high as $12/hour.

We need to make sure our job postings are current, that Infusionsoft is sending emails (not BuilderAll), that we are not mentioning ex-team members, and that we have updated training materials along the way.

I'd think that Zek, G, or Melanio would be good here-- and I'd prefer Melanio, since he's already got a lot of experience fielding requests and tweaking Infusionsoft.
Let us know.

The path for specialists is less about becoming a millionaire entrepreneur (though it may happen), but more about having a steady job that provides for the team members' families.

We've got a lot more training for Account Managers that we've made in the last 2 months, which we can put in our learning sequences (embedded in the LMS and linking to YouTube/blogs, as we see appropriate).

We still need the 6 roles for VAs-- now simplified to include things like populating a Google My Business listing, setting up Google Ads, on-boarding new clients with access, and so forth.
Tristan will help tidy up these items for ChiroRevenue with chiropractor examples to start, knowing we will rapidly re-deploy these same assets for other verticalized agencies.

We can still keep both account managers and VAs as hourly for now, since we're not rock solid yet on the MENU and supporting queue system.

Everyone here-- what do you think?
We can collect feedback and then have a team meeting to discuss.

---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Tue, Mar 9, 2021 at 12:10 AM

Subject: Re: Dennis Yu and Tristan Parmley: Executive Assistant Client Interview

Correct.

The EA is a special role because they are working directly for the executive, unlike queue workers who are performing tasks for a broad range of clients.

So the executive would have to interview their Executive Assistant for fit and relationship skill.

Also, Greg wanted to do special pricing. So we need to see and approve what he's proposing before hiring.

Juan, since you're a manager, you can automatically approve any standard VA hire without further approval.

On Mon, Mar 8, 2021 at 3:44 AM Juan Martho Agdan <juan.agdan@chirorevenue.com> wrote:
Tristan or Dennis,

Don't we still need approval from you to onboard Margaux for the Executive Assistant position?

I checked the [Master VA Hiring Course] and We don't have a process written down for that yet because the first interviewer recommending hiring is so rare.

---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Tue, Mar 23, 2021 at 5:28 AM

Subject: Re: Rocket Station x ChiroRevenue Status Update

To: Juan Martho Agdan <juan.agdan@chirorevenue.com>

You're right, Juan.

She hasn't even studied the basics yet nor demonstrated she is capable of being a manager-- or even interested.

On Mon, Mar 22, 2021 at 2:23 PM Juan Martho Agdan <juan.agdan@chirorevenue.com> wrote:
Taylor wrote,
Please also have me added to the team@chirorevenue.com list for visibility purposes.

Should I add Taylor to team@chirorevenue.com?

Last week Tristan made a comment via team@chirorevenue.com that I don't think the RocketStation team should see. It was about the Queue Tracker and the fact that Kristen Gerzin should make Queue load sheet or something to its effect.

Dennis Yu wrote
Mic drop.

Tristan, if only they understood the incredible clarity and power of what you're saying.

The "management" we have with RocketStation are slightly higher awareness VAs attempting to manage low skill and low awareness VAs-- there are no managers in this process yet except you, Juan, and myself.

We do need real managers-- that we train up (like a Graham) or hire up from other areas.

On Sun, Mar 21, 2021 at 4:32 PM Tristan Parmley <tristan@chirorevenue.com> wrote:
Team, this is an *okay* action plan but unlike our call requested it does not clarify and validate the concerns we're having, so there are some big misses which I've unpacked below.

I took a few days to watch the current plan unfold and see what happens.

Right now, this is a laundry list of actions for Jojo -- but does not share the current *Metrics* or *Analysis* of why we're doing what we're doing.

I noticed an increase in communication from Jojo last week, which is nice - but it was personally 1v1 with me.

30-minute coaching sessions on tasks he himself hasn't done will only burn more time and get further from core training - so we should cut that.

This is why we created our EOD reports, which all Specialists should complete. We can cross-reference it with their actual output and *they can communicate what they need* at the end.. which is why it's structured.

* What You Did
* What You're Going to Do
*** What You Need From Us**

99% of our EODs have "Nothing right now!" in the *What You Need From Us* section yet our average output of tasks is < 15 per day.

Thus, this is a management problem, because the Specialists do not *understand (*Analysis) that the task volume is too low, that they should speak up more (in fact it's their responsibility), and that then Jojo/Melanio can intervene on the EODs to help them.

One-on-one coaching is the classic mistake made by all managers. It's an incredible investment that almost always ends up having a negative ROI in comparison to group/process/systematic training.

If there is something they cannot complete - then we can create additional training because Jojo / Juan can clearly identify the problem, analyze why it's happening, and propose an action plan to solve it.

Juan is a pro at this.

However, without the feedback from the Specialists (which it is Jojo's responsibility to collect in their EODs), he has no ammo, and neither does Jojo, to bring a problem up to myself to solve at the root with training or process.

I saw one small example of this with "bullet-pointed tasks" being an issue. - But that was addressed on my team@chirorevenue.com update as we moved to the new task templates to make it even easier to execute.

Step 5) also must include Juan -- who makes sure the problems and concerns the Rocket Station team arise are legitimate and unique so that we don't *duplicate the same thing over and over.* Jojo would not have this context as he hasn't studied all of the training or process documents.

Unfortunately, even with a bunch of busy work for Jojo to do now, I don't think this is going to get us to our goals -- since we're not on the exact same page about what the problems are, so we keep having to re-convene how to solve them.

We must get explicit and written feedback from the Specialists so that we can clearly identify problems and change them systematically.

We must also understand that "Management" doesn't mean higher frequency in communication or coaching - but rather guiding goal-driven outcomes - where all parties know the goal.

We stated multiple times our goal is 30 tasks per day per VA -- which is only mentioned one time here in a spreadsheet column versus something we *all understand* and agree on.

I am confident we can track all of the numbers and make action plans based on what Dennis and I say... but, can we analyze problems and solve them so that Dennis and I don't have to look at this every day?

That is the power of management and the machine, **that is the help we are looking for.**

The management.

We can source and train our own VAs all day -- but we need management.

On Thu, Mar 18, 2021 at 12:39 PM Dennis Yu <dennis@blitzmetrics.com> wrote:
Both of you and either of you can respond to this.
I'll add additional comments if necessary.

---------- Forwarded message ---------
From: **TAYLOR GNAZZO** <taylor@rocketstation.com>
Date: Mon, Mar 22, 2021 at 12:10 PM
Subject: Re: Rocket Station x ChiroRevenue Status Update
To: Tristan Parmley <tristan@chirorevenue.com>, Dennis Yu <dennis@blitzmetrics.com>, Greg Brooks <greg@rocketstation.com>, Marc Nickell <marc@rocketstation.com>
Cc: Nina Katlyn Sta. Ana <nstaana@rocketstation.com>, Jojo Lopez <jlopez@rocketstation.com>, Jeck Amodo <jamodo@rocketstation.com>, Mina Austria <maustria@rocketstation.com>

Hi Team,

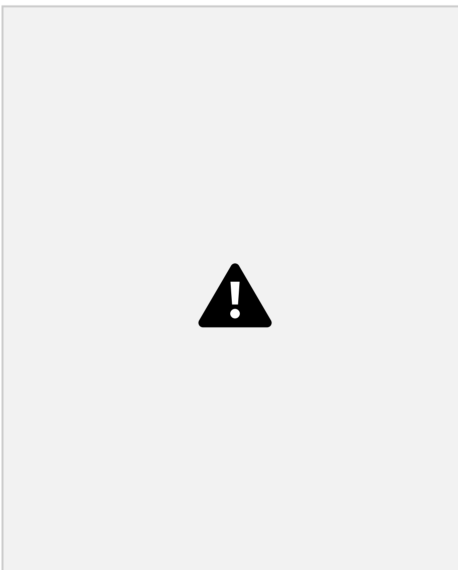
Thank you for sharing the response, and Juan, for your insight as well (everyone on the ChiroRevenue team should feel encouraged to provide us with feedback).

In regards to metrics, we identified the following in the KPI breakdown: (1) occupancy and (2) task completion, and (3) AHT. Are there additional metrics you would like us to utilize in evaluating the team's productivity?

In terms of output & our goal of 30 tasks per day, one of the reasons we're not on the same page is because the VA's are receiving positive feedback from their Queue Managers, and thus feel they do not have anything they currently need assistance on.

For example, Odessy is told she is "doing a good job", such that her QM cannot keep up with QA because she's done so many tasks. Patrick is told that his personal daily goal is 20 tasks per day. It will be helpful for all team members to be on the same page and will push our team to speak up if they know they are in fact not meeting expectations. We want to ensure our management isn't causing confusion with the VA's based on internal feedback the queue managers provide.

With the new task template, am I correct that we (all queue managers and all VA's) consider a "task" to be the overarching list (numbered 1-5) and NOT the bulleted mini-tasks underneath them? Please refer to the below example (the same screenshot Jojo shared last week). Please also have me added to the team@chirorevenue.com list for visibility purposes.



Additionally, our 30-minute coaching sessions are not task-specific. We utilize this time for our managers to build a relationship with their VA's, to prevent turnover, and to address any and all non-task-specific concerns.

We provide feedback in relation to the KPIs identified above, which is required in holding our team accountable. It is one of the reasons we see a less than 4% rate of turnover company-wide.

If you do not want the VA's pulled that is absolutely ok, but this is a practice built into our internal management process that we have seen great success with across all clients. These sessions ensure complete assessment and a structured plan of action across the team to ensure we win with proper communication.

On Wed, Mar 17, 2021 at 5:07 PM TAYLOR GNAZZO <taylor@rocketstation.com> wrote:
Hi Team!

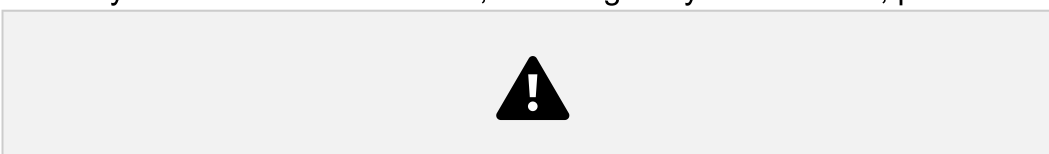
Please see below for our team’s next steps to ensure we meet your metrics, analysis, and action expectations. The following points will help us track inefficiency, equip Jojo to take on the day-to-day management, prevent missteps or miscommunications, and relay information in real-time.

1) Coaching Sessions

- Jojo pulls each VA out once every-other-week for a 30-minute coaching session. During this time, Jojo discusses VA performance, areas of improvement, team and VA wins, updates from Rocket Station and/or ChiroRevenue, questions/concerns from the VA, etc.
- If Jojo identifies a red flag/area of improvement during his day-to-day check-ins, he will pull the VA for a coaching session in real-time.
- Please confirm if you are OK with the coaching process above. We can also provide you with a coaching schedule so you know exactly which VA is removed from the queue at any given point in time if that is helpful. We will also notate any coaching sessions that took place on the EOD report (see below).

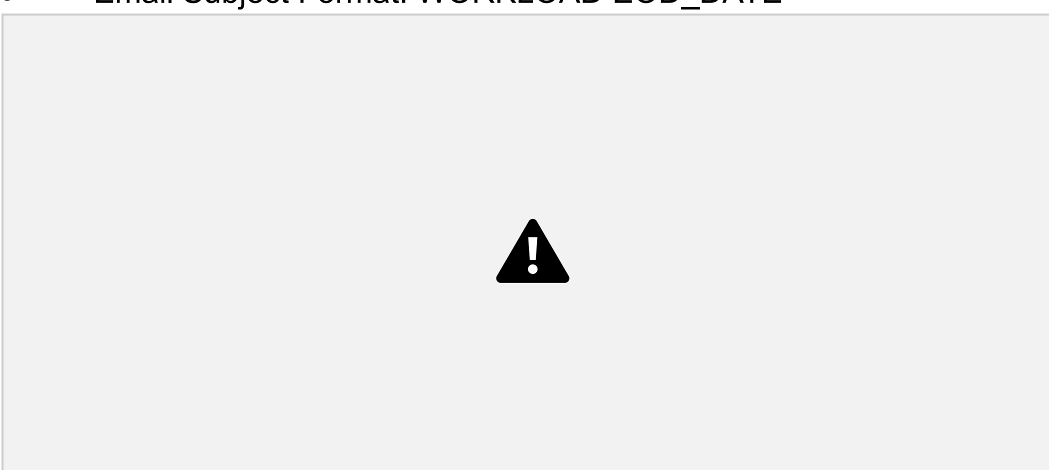
2) KPI's

- We will utilize the below KPI’s in measuring VA success. If there are any additional metrics you would like us to utilize, or change any of the below, please let us know.



3) EOD/EOW Report

- Please see below for a sample EOD/EOW report. If there is anything you would like adjusted or added, please let us know.
- At every start of a shift, Jojo will email you an EOD report from the shift prior.
- You will also receive an EOW report following the same format.
- Email Subject Format: WORKLOAD EOD_DATE



4) Rocket Station Schedules

- **Jojo:** Monday-Friday, 8 AM - 5 PM CST
- **Nina:** Monday-Friday, 7 AM - 4 PM CST
- **Taylor:** Monday-Friday, 9 AM - 1 PM CST

5) Rocket Station Roles

- **Jojo:** You and your VA's main POC at Rocket Station. Liaison between operations and the day-to-day management of your VA's. Any red flags, questions, or celebrations regarding your VA's can be fielded directly through Jojo.
- Any new hire, replacement, or termination requests should be fielded through Jojo, who will then communicate with the Placements Team (Mina).
- Any process document update requests should be fielded through Jojo, who will then communicate with the Process Development Team (Jeck/Kazel) and Nina and/or Taylor, if necessary.
- **Nina:** High-level operations POC here to support Jojo. Please CC Nina on all communications with Jojo.
- **Taylor:** High-level operations POC. If at any time you are not satisfied with the structure or process in which we are operating, or need to have a high-level conversation in regards to your team, Taylor will act as your main POC. Liaison between PH and US Operations. Please CC Taylor on all communications with Nina.

6) Day-to-Day VA Management

- Jojo will utilize TimeCamp to monitor VA productivity in real-time. The expectation is that Jojo will check on the team at least three times per day, plus consistent monitoring via real-time chat.
- If a VA is not meeting expectations Jojo will reach out directly to the VA to identify the problem and a plan of action.
- If the issue is manageable without assistance from a ChiroRevenue POC, Jojo will take the necessary actions and notate the event on the EOD report.
- If the issue requires assistance from a ChiroRevenue POC, or Jojo identifies it as something that ChiroRevenue needs to be made aware of in real-time, he will reach out directly to Tristan (or another identified POC, please confirm).
- Any common areas of concern/patterned struggles will be notated for further exploration & incorporation into process documentation (see RS PRODUCTIVITY TAB on QUEUE TRACKER).

7) For Discussion

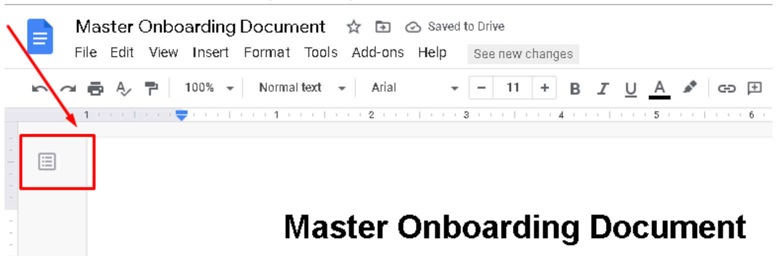
- Identify a process of accountability on all process document-related pieces (EX: 1,000 Task Library).
- VA's are expected to reach Level 3 within six weeks (one level increase every two weeks). Currently, level progression is determined by VA performance and a solid understanding of the tasks performed at the current VA level. Who will determine level progression? Is this something Rocket Station needs to track/manage?
- Infusionsoft update.
- The Process Development team is awaiting finalized master guides for modules 7-12 (Juan is on it, just including here as a reminder).

Billable Time

Billable	Not Billable
Answering emails, joining team calls, submitting files, submitting End Of Day Reports	Going to the bathroom, making coffee, grabbing water, etc.
Setting up downloads and uploads, e.g. clicking the buttons and organizing files	The duration of the upload or download.
Video Editing	The duration of rendering or exporting.
Graphics Designing	The duration of rendering or exporting.
Installing applications necessary to do your work, e.g. Zoom, TimeCamp, Skype, etc.	The duration of downloading the software you need, your computer being frozen, your internet being cut-off, troubleshooting hardware issues, turning on another PC to use.

Master RocketStation Document

Click on the Outline icon on the left for easy navigation.



Master Guides

- [1. Master T.E.A.M. System Process]
- [Agency Dash Onboarding]
- [GMB Posting Guide]
- [How To Set Up Reply From And Email Forwarding]
- [Master Amplification Guide]
- [Master Access Checklist]
- [Master Content Marketing Guide]
- [Master Guide]
- [Master Onboarding Document]
- [Master Operations Process Guide]
- [Master Reactivation Campaign Guide]
- [Master VA Hiring Guide]
- [Master Video Editing Process Guide]
- [MASTER Website Checklist]
- [Moz Domain Rank]
- [SEO 101]
- [Using Conversion.ai]
- [Youtube Posting Guide]
- [Level 1 Specialist Course]

Spreadsheets

- [ChiroRevenue Asset Tracker]
- [Dennis Yu/Tristan Parmley Client Interviews]
- [RS & ChiroRevenue Playbook Masterfile]
- [RS Contacts] (Team Roster)

Other Resources

Google Drive: RS_Dennis Yu & Tristan Parmley
clients.chirorevenue.com
Conversion.ai
Content Library Template
The TEAM Tracker
SEMRush
RocketStation creatives, logos, and resources

Outline of Initial Roles

Your timing is perfect-- since we are ready to scale for our chiropractor agency and all the other agencies we're involved with.
Our documentation is a bit messy, so our team is working on this, starting with a few simpler "menu" items that we want to expand upon.

As Robert suggested, let's "stress test" with a few VAs full-time in these 4 roles:

- Executive Assistant:
- to manage meeting scheduling and follow-up, via the Meetings Checklist of what we do before, during, and after a meeting. This is more senior than a standard personal assistant role, since the relationships are higher power with some nuances, they will sometimes have to play gatekeeper tactfully, and they will have to know our Asset Tracker (our library of training documents that we share with clients and partners).
- Google Ads VA:
- using our templated campaigns, set up new chiropractors based on the services they offer (ad groups), do monthly maintenance according to our optimization training, and send out a report.

Content VA:

● Not copywriting-- but cross-post items marked RTP (ready to post) to Facebook, YouTube, Twitter, and the blog for each client. A senior content VA can also boost any post for $1 a day for 7 days on Facebook to the client's primary audience (a pre-created audience anyone who is within 4-7 miles of the office).

Certain videos

• 3x3 - tasks done - ongoing we might want 2-3 edited per month if any
• Video Editor Not creative just templates
• 6-10 per hour
• Has to go through Proper Training

Second Level of Check - Approve or Check -

Higher Level Content VA to Posting - 50 photos and videos on GMB - 1 post per week on Facebook and Google
Task to the training: Here is the one pager.

We have to teach it as a course because it requires a level of exactness. We can overcome documentation by it being clean and clear. We should be able to onboard a ton more of these video editors. Less than a 1% of rejection rate.

Gathering Positive Mentions and Assembling a Content Library,

Level 3 VA onboarding it only happens once: any time they're mentioned. Items we might want to re-use and use as other types of content. Best content is what people say about us. We don't generate much.
Score by authority on a 30 point scale -

Level 1 Community Manager & video editor

still collecting content to cross-post Collect Positive Mentions training

Level 2 Content Cross-post VA

access to google my business and posting on behalf of the client
Every time the client posts on Facebook we want to copy it on FB and put it here.
Copy it as evergreen doesn't have to be what's new.
If we don't have a photo we can add one of the photos of the doctor

Level 3

Writing Posts and posting to site for boosting

Crossposting and collecting positive mentions
Review the training
Community manager training
• https://3.basecamp.com/4057320/buckets/8375290/todos/2681081749
• https://www.facebook.com/dennisyu/posts/10102881160498249

Content Q Collect & Cross-post
4.1 Content Q Editing Skinning
4.2 Blogs & Writing

SEO A Level 3 content VA (who knows SEO) can use our Semrush account (we create a general login for them) can do this one-time setup for clients.
We set a task for Semrush configuration as part of on-boarding, so this is a task in the queue.

Video editor VA:

● Process one minute videos submitted by clients via the appropriate template. We have a new queue process using Descript that eliminates the need for Premiere. And more automation that we're documenting, since we need to process 1,000 videos a month.

We have training on these and 3 other roles we'd like to expand into-- more people in more roles. My hope is we can grow to 12 VAs with you within 90 days-- however fast or slow we need to go-- documenting along the way so everyone can see.

In other words, we think this is the best business development or marketing campaign that either of our companies could do-- to teach by example.

And this would include serving clients like Escape Fitness (Matthew Januszek), who is a big believer in what we're doing.

There are a couple other roles we could consider, which are more advanced:

● Digital Plumbing VA:

● Go through the Access Checklist to verify we have all components, coordinating with clients who get stuck along the way in granting us necessary access to Google, Facebook, their blog, and a couple other items. Sometimes we need to get on Zoom with the client when they just don't want to go through our step-by-step instructions (which have screenshots and videos). It's the Zoom calls that make this advanced, instead of document production and more mechanical tasks.

● Community Manager:

● A senior version of the Content VA, since they also engage with our communities (whether us or on behalf of clients), collecting positive mentions into the Content Library and responding to questions/complaints. We have 3 levels of training here.

From a systems-builder point of view (for us on this thread, not for VAs or account managers to understand), everything that we teach as a course is also a package. In other words, the checklists are either DIY or DFM (done for me)-- such that all tasks on our menu are part of a course and vice-versa.

Our account managers are "waiters" in the restaurant, while the VAs are "cooks" preparing the food. Thus, we need more cooks in the kitchen and make sure customers don't order anything not on the menu.

+ Juan who is our Menu Master-- making sure that all items on the menu have associated training, which we lovingly call the 1,000 task library.

We don't have 1,000 tasks ready to go-- more like 100 across all functions, but we're getting there.

This 39 minute video is our deepest, clearest, internal explanation of what we're doing and where we are going:

https://f.io/TJKlkPfS

Jan 6,2021 addition:

Process Development VA

-tunes our guides and courses-- looking at our execution and turning them into checklists and such.

-Updates database of documents.

-watch over the "pay per task" model we're rolling out to help audit task completion, troubleshoot where we have problems (largely in process), and suggest improvements to how we qualify and and train up people.

-Test our software we're building that manages this system.

Feb 24, 2021 addition:

Chat Support Community Manager

VA for Internal for ChiroRevenue and for clients

For all clients, we will have FB chatbots, texting, and social channel responding.
Able to set up chatbots with triggers and rules
Will manage some client inboxes
Process-driven chat support teammate with impeccable written English skills.

Screening:
Screen hard in their written responses to the application.

Communication, Accountability and Delivery

EVERY new team member should read this. Every existing team member should review this… frequently!

This is how we're going to win at the next level.

This evening I received an email from our Account Managers wondering how to operate our queues, tasks, and team in a way we all move forward and manage work-life balance at the same time.

This is how.

The beauty of checklists is when they're good, shadowing should be no more than 30 minutes.

***I do**, you watch. **You do**, I watch.*

I mentioned briefly they should be short on the company call, but perhaps I didn't make it very clear, we covered a lot very quickly.

I will clarify this for the company because it's critical to moving forward and **#Winning.**

Communication is key and to win we must address all concerns.

It's the lifeblood of our success and the pulse for clients.

There is never the "taking away" of a lightweight touch... By not delivering our message we hurt their progress and ours.

You don't want your doctor to wait to tell you your heart is failing because they already told you your leg was broken.

Give'm the news, doc!
Our clients pay us to tell them what to do.

Then we do it for them.

The company's number one priority is filling the queues with tasks that impact our client's business, which impacts their lives and the communities they heal.

When we understand what needs to be done, we do it.

Waiters.

Account Managers are ultimately accountable for the tasks that get kicked off by a client getting started with us, and the work getting completed. Like waiters, in a 5-star restaurant.

Notice clients say "Where's my order?"

Cooks.

By loading all of the orders into a queue, the cooks know exactly what to make with the ingredients in the kitchen. There are different specialties in the kitchen too.. burgers, pizza, chicken, etc. Queue workers.

But oftentimes with a signature meal, the chef comes from the kitchen to let you know exactly what's being done with our specialty "steak dinner." — which for us is Content (Alejandra).

But there are other specialty dinners too.. other "steak dinners."

Plumbing & Analytics - Daniel
Video Editing - Josh
Content - Alejandra
Copywriting & SEO - Cole
Websites - Dan
Facebook Ads - Brendon
Google Ads - Bruno

And more.

Chefs are accountable for their specialty being delicious and their cooks delivering quality.

Now to clarify… this analogy only works when we remember that restaurants have "menus."… you can't just get what you want.

Neither can our clients.

And there is no "Chef's Choice" where chefs do whatever they want.

When we're objective-driven, we see that we want to get as much done as possible according to that list.

Other than Sunday, Chik Fil A is *always* busy. That's no coincidence, their orders are excellent every time, *everywhere.*

Repeatable excellence.

Short answer - Alejandra as a content community manager is responsible for communicating with the client as well because she is accountable for their content being collect & published + everything in between.

This specialty is uniquely client and team heavy because it's a "create your own" even though it's the same menu. (Chipotle, Subway, Blaze Pizza)

Account Managers make sure we're delivering an ROI and reporting to the client everything that is happening. "Your order will be out soon", getting refills, delivering desserts, and taking the check.

Right now we're "Slammed" with orders to crank out, and we're only getting busier!

So we must document our menu as clear as we can, know it off the top of our heads as a team.

We must know exactly what's in stock in the kitchen, and how to get orders in.

We'll focus on hiring more cooks, waiters, managers, etc.

This is why the **End of Day reports must always** have at least **one question** and **one need**.

Replacing team QA.

What *don't* you know how to do?

What *do* you need to do X, Y, or Z better?

What do you *want* to learn more about?

Just like the chefs say they're out of steaks or ketchup, and the managers put in the business orders with the suppliers.

Just like once we're mastered the grill we can learn pastries and level up!

We all have a role in our client's success. It takes *all* of us to win.

So let's deliver as many orders as deliciously as possible according to the menu.

Fill The Queues - Get great at delivering food to the clients and taking orders in a friendly way.

Empty The Queues - Get great at "Order Up!" - so our clients leave full and happy!

And clean up *everything* before, during and after!

Chiro Goals and Queue Managers
Team QA,
Client QA
Assets & Processes.
master onboarding checklist and duplicate our template project
Clients.Chirorevenue.com
Conversion.ai
Content Library Template
The TEAM Tracker
SEMRush
Here is the SEM RUSH onboarding checklist

Great call team!!

COMPANY GOAL: Get to Queue 0 each day.

Everything we do is Finite - there are no random tasks.

Kristen: move the tasks that are not clear back into the client's project to re-assess based on what they need.

Jonina - Copy the team tracker into each client's drive folder. Make sure you're using your ChiroRevenue email.

Queue Managers:

Remove the waste - Including inside the queues.

Managers have permission to update the task template - but be sure any update that requires an action has the ability to QA inside the task, and any task update is directly correlated with **existing training.**

For example:
Task Install Facebook Pixel: "Provide Screenshot of Pixel Installed using FB Pixel Helper"

We will use the queues for **all clients** in **all agencies** in **all verticals** since it's the same message. That's why linking to the projects are so important! :)

POC's FOR ALL QUEUES
When duplicating a task you can Delete the "Template" part (before the pipe) but leave everything else. (Juan add this to the basecamp basics with a screenshot example)

- Melanio**- - old tasks and dead tasks.** - Copy active tasks into the active task list.

- Daniel Goodrich - **Plumbing Queue**
- Josh Hamby **Video Queue**
- Juan **- Design Queue**
- Alejandra - **Kill the FDD Queue -** done on weekly optimization.
- Dan Pasker - **Landing Page Queue: Move complete tasks to project template**
- **Bruno and Brendon -** ALAN and Google Ads Queue
- **All Teammates Get Access to TEAM System Onboarding Section -** Send your analysis as a response to this thread tagging Dennis & I.

Juan - Make sure the master google doc each of these stages lives at the top of each queue. The link shouldn't need to be updated since we're updating the documents directly now for awhile - eventually, we'll swap it with the landing page.

I will send the call recording when it processes. If you have a question, quote/reference the section and add it to team QA!

Topic: Team Call, Processes & Queues 2-1-21

Meeting Recording:
https://us02web.zoom.us/rec/share/EnGFfaJPpcgT5r0vHzflIdlcym1Pgmb8UR-og-93bWNEH49s7kHcW7pLScZrBD92.6qKQ_I8xQGSziwEW

VA Onboarding Process Flowchart

([Link to PDF]())

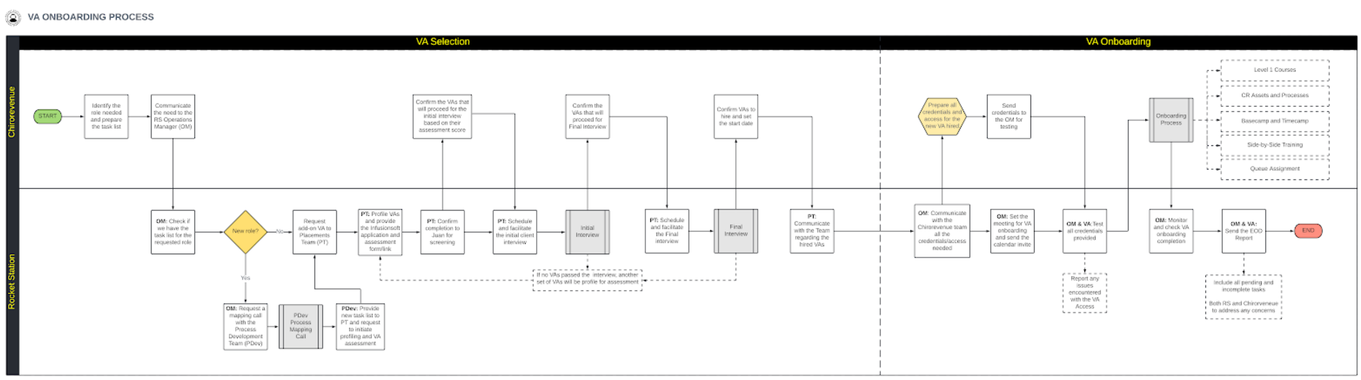
VA HIRING & ONBOARDING PROCESS

Topics:

- VA Hiring
  - Request
  - Profiling
  - Screening
  - Interviews

- VA Onboarding
  - Credentials
  - Onboarding

Process:



[Hiring and Onboarding Process Flow]()

VA Hiring

1. ChiroRevenue: Identify the role needed and prepare the task list

2. ChiroRevenue: Communicate the need to the RS Operations Manager (the 7- business days clock starts). Send an email to RS Ops Manager

Subject Line: ChiroRevenue Additional VA - Date

Hi Team,

We need VAs for the following Posts:

- *# - Content VA*
- *# - VA Editor*
- *# - Google Ads VA*
- *# - Ops Process VA*
- *# - Instructional Designer*

Kindly send profiles that fit the skills we need. We'll wait for the Infusionsoft application and assessment completion.

Thanks,
Signature

3. RS Ops: Check if we have the task list for the requested role.

New Role?

YES - OM to Request a mapping call with the Process Development Team (PDev)
- PDev to Process Mapping Call
- Provide the new task list to the Placements Team (PT) and request to initiate profiling and VA assessment. Proceed to step 4.

NOTE: 7-business day timeline may be adjusted based on the discussion and VA availability of the new role

NO - OM to request add-on VA to Placements Team (PT). Proceed to step 4.

4. RS Placements: Profile VAs in 24-48 hours and provide the Infusionsoft application and assessment form/link

<INSERT LINK HERE>

The VAs need to create a summary of the discussion based on the following video link per role:

- Executive Assistant 7:40 to 32:35 of 23Dec2020 - PMC - Dennis Yu & Tristan Parmley.
- Google Ads VA - 32:34 to 58:00 of 23Dec2020 - PMC - Dennis Yu & Tristan Parmley.mp4
- Video Editor VA - Jan 25 PDC - Dennis Yu & Tristan Parmley
- Content Specialist VA - Jan 26 PDC - Dennis Yu & Tristan Parmley
- Instructional Designer VA - Jan 29 PDC - Dennis Yu & Tristan Parmley
- Ops Process VA - Jan 29 PDC - Dennis Yu & Tristan Parmley
- Chat Support - *<Insert Video Link Here>*

Roles and Tasks:

Role: Video Editor VA

Tools:
- Basecamp
- Descript

Tasks:
- Edit pre-packaged video (transcribed) sent by clients (1,000 videos a month)
- Log in to Basecamp. Go to Editing Queue > To Dos > Access Drive Link to Assets > Raw/B-roll Folder. Download the videos.
- Access CR Drive > Chiro Revenue & Companies > Chiro Revenue HQ > CR Assets & Processes > Content > Video SOP

- Follow the Master Video Editing Process Guide (A 15-min guide to edit a video via Descript)
- Access the Creator Drive > Chiro Revenue Templates - to select templates, color schemes, and different aspect ratios
- Access the CR Clients folder > _A_Pod > (C_Dr_Client_Name) folder > Branding & Templates - to get the client's logos, color guides etc.
- Reupload the newly edited video to the Final Edits folder
- Leave a comment on To-Dos for the Account Manager to review and approve

WATCH and CREATE A SUMMARY: Video Editor VA - [Jan 25 PDC - Dennis Yu & Tristan Parmley]
Get a copy of their past works - to be submitted before the scheduled interview

Role: Content VA

Tools:
- Basecamp
- Google My Business
- Semrush
- Basecamp - Content Library

Tasks:
- **1st Level (Expert)** - Cross-post items marked RTP (ready to post) to Facebook, YouTube, Twitter, and the blog for each client.

- **2nd Level (Senior)** - Approves, publishes, and boost any post for $1 a day for 7 days on Facebook to the client's primary audience (a pre-created audience - anyone who is within 4-7 miles of the office) Collect positive mentions into the Content Library and responds to questions/concerns

- **3rd Level (Senior Community Manager)** - also called “Senior Content Marketer”, run a backlink/site audit, resolve issues re: broken URL, setup brand monitoring by adding in the Doctor’s name and practice, set up an on-page SEO tracking (Technical SEO/SEO Quake - SemRush). Write articles/blog posts and link doctor's site and company site via conversion.ai (not required but, experience in WordPress is a plus). Reach out (link building) to website owners to increase ‘Authority Score’ in Semrush. We only reach out to big businesses with AS of 40% and up, and local businesses with AS of 20% and up.

WATCH and CREATE A SUMMARY: Content Specialist VA - [Jan 26 PDC - Dennis Yu & Tristan Parmley]

Role: Google Ads VA

Tools:
- Basecamp
- Google Ads Training
- Google Ads Admin
- Materials / Templates for Ad Creation
- Reports

Tasks:
- Prep google ads. Build ads using existing templates - understand local and subcategories of every industry or business
- Set up new chiropractors based on the services they offer (ad groups)
- Do monthly maintenance according to the optimization training, and send out a report.
- Future task - train incoming VAs on the company’s google ads process

WATCH and CREATE A SUMMARY: Google Ads VA **-** 32:34 to 58:00 of [23Dec2020 - PMC - Dennis Yu & Tristan Parmley.mp4]

Role: Instructional Designer VA

Tools:
- Zoom + Loom
- Basecamp
- Adobe InDesign

Tasks:
- Update existing documents' linkages.

https://drive.google.com/file/d/1VQpNny9Apltp9_bHRvuSDv4wwnqfID_M/view
- Creates process documents from zoom training sessions. Update database of documents. Clean-up/Edit zoom sessions to make it instructional. Updates the software. Need someone who fully understands the 9 triangles training.

WATCH and CREATE A SUMMARY: Designer VA - [Jan 29 PDC - Dennis Yu & Tristan Parmley]

Get a copy of their past works - to be submitted before the scheduled interview

Role: Operations Process VA

Tools:
- Basecamp
- Infusionsoft
- GSuite

Tasks:
- Tunes team guides/courses, looking at the execution and turning them into checklists.
- Watch over the "pay per task" model currently rolled out to help audit task completion, troubleshoot where there are problems (largely in the process), and suggest improvements to how we qualify and train people.
- Test the software that manages the system.

- Review Operations Process VA: [Course Builder Course].

WATCH and CREATE A SUMMARY: Ops Process VA - [Jan 29 PDC - Dennis Yu & Tristan Parmley]

Role: Chat Bot Support Manager VA (PENDING)

RS Placements: A time block will be offered to Juan for the initial interview schedule.

5. RS Placements: Confirm completion to Juan for the screening of applicants:

Send to: Juan Martho AgdanCC: RS Ops
Subject Line: ChiroRevenue VA Selection - Date

Hi Juan,

We've completed the application and assessment via Infusionsoft. Please let us know who are the candidates that will proceed to the next stage. Here are the names of the applicants:

- *VA 1*
- *VA 2*
- *VA3*

We'll wait for your confirmation within 24 hours. Once we receive the names of the VAs who passed, we will schedule an interview on XXXXX at XX:XX am/pm PST.

Thanks,
SIGNATURE

RS Placements: provides candidates with the below content to review ahead of the interview:

- Social amplification Engine Guide
https://drive.google.com/file/d/1g_zDlblc44prgJYEy8oRNrWDdnmFuD4K/view?usp=sharing
- Course Builder Course
https://f.io/TJKlkPfS
- Logic Engine https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be

6. ChiroRevenue: Confirm the VAs that will proceed for the initial interview based on their assessment score 24 hours after the applications were received. Also, confirm the availability based on the time and date provided. Use the same email thread that the Placements Team sent. (Day 3)

Send to: RS Placements **CC:** RS Ops
Subject Line: Re: ChiroRevenue VA Selection - Date

Hi Placements,

Please line up the following candidate for interview based on your the provided time and date:

- *VA 1*
- *VA 2*

Thanks,
SIGNATURE

- Placements to be included on the pass/fail notification in Infusionsoft
Placements@rocketstation.com
- If no communication comes from the ChiroRevenue team, RS Placements follows up to confirm status after 24 hours.

7. RS Placements: Send the schedule invite with zoom link for the initial interview based on the blocked time and date offered.

8. RS Placements to facilitate the Initial Interview Process with Juan (Day 4)

NOTE: All documents and recordings need to be saved in this **DRIVE**. For the Video Editor and Instructional Designer role, get copies of their past work and save it to the same drive. Send it over prior to the scheduled interviews.

9. ChiroRevenue: Confirm the VAs that will proceed for the Final Interview (Day 5)

Send to: RS Placements **CC:** RS Ops, Tristan Parmley Dennis Yu
Subject Line: Re: ChiroRevenue VA Selection - Date

Hi Placements,

We'd like to endorse the following VAs for the final interview:

- *VA 1*
- *VA 2*

Please schedule the final interview with Tristan and Dennis.

Thanks,
SIGNATURE

10. RS Placements: Schedule and facilitate the Final interview

Send to: Tristan Parmley Dennis Yu **CC:** RS Ops, Juan Martho Agdan
Subject Line: Re: ChiroRevenue VA Selection - Date

Thank you, Juan!

Hi, Dennis and Tristan!

It's great to reconnect with you!

Are you available on <DAY>, <DATE>, at <TIME> PST to meet with eligible candidates?

Thank you,
Signature

- Wait for the confirmation and send the calendar invite with the zoom link.

11. RS Placements to facilitate the Final Interview Process (Day 6-7)

12. ChiroRevenue: Confirm VAs to hire and set the start date

Send to: RS Placements **CC:** RS Ops, Juan Martho Agdan
Subject Line: Re: ChiroRevenue VA Selection - Date

Hi Placements,

We'd like to endorse the following VAs for the final interview:

- *VA 1*
- *VA 2*

Please schedule the final interview with Tristan and Dennis.

Thanks,
SIGNATURE

13. RS Placements: Communicate with the Team regarding the hired VAs. The start date is 48 hours after hiring confirmation.

Send to: Tristan Parmley Dennis Yu **CC:** RS Ops, Juan Martho Agdan
Subject Line: Congratulations on your New Rocket Station Virtual Assistants!

Hi, Dennis and Tristan!

Thank you for collaborating with us to identify the group of V.A.s who will join your team.

As discussed, the following VAs will join the ChiroRevenue team on, <DATE>, <TIME> shift. Please see their details below:

Name:
Email:

Name:
Email:

Jojo will provide his awesome support for this team and coordinate with Juan for the system setup.

Thanks!
SIGNATURE

VA Onboarding

1. RS Ops: Communicate with the Chirorevenue team all the credentials/access needed:

Send to: Juan Martho AgdanCC: RS Ops Melanio Soliman

Subject Line: ChiroRevenue Onboarding - Start Date

Hi Team,

Here's the list of new VAs to be onboarded on <DATE>:
- *Name*
- *Name*
- *Name*

We need to create access for the following tools:
- *Email account*
- *Access to the drive*
- *Basecamp*
- *Descript (for Video editor)*
- *Other tools needed to complete the assigned task*

Thanks,
Signature

- RS Ops: Set the meeting for VA onboarding and send the calendar invite with the Zoom meeting link

Invitation Title: ChiroRevenue Onboarding
Description: List the names of the VAs that will be trained

2. ChiroRevenue: Prepare all credentials and access for the new VA hired

3. ChiroRevenue: Send credentials to the OM for testing

Send to: RS Operations Manager
CC: Nina Katlyn Sta. Ana, TAYLOR GNAZZO, and Melanio Soliman
Subject Line: VA Credentials - VA Start Date

Hi,

The credentials have been created and added on the POCs tab of this file:

https://docs.google.com/spreadsheets/d/1aAy4WcwQLP4xETdRpjZ1HBEFodAdRDp-nT-gYXUX1xg/edit?usp=sharing

Kindly test the email account and let us know if there are any issues encountered.

Thanks,
Signature

4. RS Ops: The OM & VA to test all credentials provided. Report any issues encountered with the VA Access. OM to also complete the tasks below:

TASK	PERSON IN CHARGE	TIMELINES
Once identified, Jojo to do the internal RS onboarding with the hired VA's. Once completed, Jojo will communicate with Melanio to assign the queues.	Jojo (Rocket Station)	Complete 2 days prior to the Go-Live date
Ensure that Queues are built already. Share the details with Jojo so we can work on all the zoom invites on all the training on Day 1.	Melanio (Chiro Revenue)	a day prior to our Go-Live date

5. ChrioRevenue to facilitate the Onboarding Process

The following needs to be discussed/completed during Day 1- Onboarding:

- Level 1 courses
- CR Assets and Processes
- Basecamp and Timecamp
- Side-By-Side Training
- Queue Assignment

Day 2 Training- Specific to the VA roles and responsibilities. Refer to the Master guides based on roles/queue assigned.

6. RS Ops: OM to monitor and check VA onboarding completion
7. RS Ops: OM & VA to send the EOD Report - refer to this file for the RS EOD format:

Sample Report

Break Down	Details	Good	Bad	What could have been better?
02/09/2021				
People	**Queue Management**	n/a	Ensuring the correct positions/queues are assigned to team members (especially at scale).	Identify queue managers and create communication channels prior to go-live.
Process	**Basecamp EOD Reporting**	n/a	Ensure that EOD reporting is enabled (BC) ahead.	What do we want to see on the EOD Report? Do we have a particular format to follow? Data-driven?
Tools/Platforms	n/a	n/a	n/a	n/a

OVERALL RECOMMENDATION AND HELP NEEDED
✔ Glossary - RS and Chiro Revenue Terminologies
✔ Create an Onboarding Plan for Newly Hired VAs which includes Onboarding checklist
✔ Redefine the role of Jojo versus the Queue Managers and Ops Specialist which includes a schedule for coverage.
✔ Identify the Non Negotiables (Leave Application, Schedule, Response Time) and once completed we will create a Welcome Starter Kit Packet to all VAs.
✔ Streamline the tool that we will use to communicate for faster correspondence
✔ Create a playbook that will serve as a one stop shop for all.

NOTE: Include all pending and incomplete tasks. Both RS and Chiro Revenue to address any concerns raised.

POC's FOR ALL QUEUES
When duplicating a task you can Delete the "Template" part (before the pipe) but leave everything else. (Juan add this to the basecamp basics with a screenshot example)

POC	QUEUE
Melanio	Old tasks and dead tasks. Copy active tasks into the active task list.
Daniel Goodrich	Plumbing Queue
Josh Hamby	Video Queue
Juan	Design Queue
Alejandra	Kill the FDD Queue (done on weekly optimization)
Dan Pasker	Landing Page Queue: Move complete tasks to project template
Bruno and Brendon	ALAN and Google Ads Queue

All Teammates Get Access to TEAM System Onboarding Section - Send your analysis as a response to this thread tagging Dennis & I.

Hiring Process

PROCESS TIMELINE:

Timeline Overview: 7 Business Day Turnaround → VA start date no sooner than 48 hours after VA selected

- Chiro notifies RS Operations Manager (Jojo) of new position (7 business days days clock starts)
- IF it' s current position (complete process documents and checklists) → Route to Placements (Mina)
- IF it's a new role or processes need to be reviewed prior to hiring → Route to P Dev team (Kazel)
- RS Placements evaluates candidates and readies candidate pool for screening
- RS Placements provides screened candidates with Chiro INFUSIONSOFT link and video links , which has questions and 1 video corresponding to the role that the applicant must watch, and review (https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be) for initial screening and writing sample (48 hours for VA candidate to complete)

Executive Assistant VA

7:40 to 32:35 of 23Dec2020 - PMC - Dennis Yu & Tristan Parmley.

Video Editor VA

Jan 25 PDC

https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx

Content VA

Jan 25 and 26 PDC

https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx

Google Ads VA

32:34 to 58:00 of 23Dec2020 - PMC - Dennis Yu & Tristan Parmley.mp4

https://drive.google.com/file/d/1yZue5aGRpopISXI0OpqDoQhZugDiDupO/view?usp=sharing

Designer VA

Jan 29 PDC

https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx

Process Development VA

Jan 29 PDC

https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx

- INFUSIONSOFT sends pass/fail confirmation to CHIRO Operations (Juan)

- CHIRO Operations (Juan) notifies RS Placements of the VA's approved to move to interviews (24 hours to complete)

- if no communication comes from Chiro team, RS Placements follows up to confirm status after 24 hours through Skype or phone)

- RS Placements schedules Interview 1 with Juan, provides him CV and resumes and RS Placements provides candidates with the below content to review ahead of interview:

All VA roles:

1. Social amplification Engine Guide https://drive.google.com/file/d/1g_zDIblc44prgJYEy8oRNrWDdnmFuD4K/view?usp=sharing
2. Course Builder Course https://f.io/TJKlkPfS
3. Logic Engine https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be

Instructional Designer VA

01Mar2021 - PDC - Process tracking and documentation.mp4

Operations Process VA

01Mar2021 - PDC - Process tracking and documentation.mp4

- Chiro Operations (Juan) selects candidates to move to final interview (immediately following interview)

- RS Placements Schedules this with Tristan and/or Dennis no later than 48 hours after Interview 1 Selection

- Tristan and/or Dennis Select Candidates and move to onboarding via RS Operations team

All this should take no longer than 7 BUSINESS DAYS, unless additional process mapping and building is required for a new position.

MINA - To send the candidates to Juan and have the VAs fill out the INFUSIONSOFT link

JUAN - Screening applications sent and confirmation on who will be endorsed for the initial interview within 24 hours

JUAN - POC for the Initial interview - confirmation on who will be endorsed for the final interview within 24 - 48 hours (or immediately following interviews if possible)

Tristan and Dennis - POCs for the Final interview - confirmation on who will be hired within 24-48 hours (or immediately following interviews if possible)

Role: Video Editor VA

Tools:
- Basecamp
- Descript

Tasks:
- Edit pre-packaged video (transcribed) sent by clients (1,000 videos a month)
- Log in to Basecamp. Go to Editing Queue > To Dos > Access Drive Link to Assets > Raw/B-roll Folder. Download the videos.
- Access CR Drive > Chirorevenue & Companies > Chirorevenue HQ > CR Assets & Processes > Content > Video SOP
- Follow the Master Video Editing Process Guide (A 15-min guide to edit a video via Descript)
- Access the Creator Drive > Chirorevenue Templates - to select templates, color schemes, and different aspect ratios
- Access the CR Clients folder > _A_Pod > (C_Dr_Client_Name) folder > Branding & Templates - to get the client's logos, color guides etc.
- Reupload the newly edited video to the Final Edits folder
- Leave a comment on To-Dos for the Account Manager to review and approve

Preference: Get copies of applicant's past work added to the folder and sent over ahead of interviews.

Videos to watch: Create a 1-page summary.
- Social amplification Engine Guide https://drive.google.com/file/d/1g_zDIblc44prgJYEy8oRNrWDdnmFuD4K/view?usp=sharing
- Course Builder Course https://f.io/TJKIkPfS
- Logic Engine https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be
- **Jan 25 PDC** https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx

Assessment:
https://docs.google.com/document/d/1R_uPBEN81HHSPy5Mr3A5upwkLZKt4ZxbrMU7g1t5GAs/edit?usp=sharing

Initial Interview: Juan

Final Interview: Dennis and Tristan

Role: Content VA

Tools:
- Basecamp
- Google My Business
- Semrush
- Basecamp - Content Library

Tasks:
- **1st Level (Expert)** - Cross-post items marked RTP (ready to post) to Facebook, YouTube, Twitter, and the blog for each client.

- **2nd Level (Senior)** - Approves, publishes, and boost any post for $1 a day for 7 days on Facebook to the client's primary audience (a pre-created audience - anyone who is within 4-7 miles of the office) Collect positive mentions into the Content Library and responds to questions/concerns

- **3rd Level (Senior Community Manager)** - also called "Senior Content Marketer", run a backlink/site audit, resolve issues re: broken URL, setup brand monitoring by adding in the Doctor's name and practice, set up an on-page SEO tracking (Technical SEO/SEO Quake - SemRush). Write articles/blog posts and link doctor's site and company site via conversion.ai (not required but, experience in WordPress is a plus). Reach out (link building) to website owners to increase 'Authority Score' in Semrush. We only reach out to big businesses with AS of 40% and up, and local businesses with AS of 20% and up.

Videos to watch: Create a 1-page summary.
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https://drive.google.com/file/d/1g_zDIblc44prgJYEy8oRNrWDdnmFuD4K/view?usp=sharing
- Course Builder Course https://f.io/TJKIkPfS
- Logic Engine https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be
- **Jan 25 and 26 PDC**
https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx

Assessment:
https://docs.google.com/document/d/1R_uPBEN81HHSPy5Mr3A5upwkLZKt4ZxbrMU7g1t5GAs/edit?usp=sharing

Initial Screening: Juan

Final Screening: Dennis and Tristan

Role: Google Ads VA

Tools:
- Basecamp
- Google Ads Training
- Google Ads Admin
- Materials / Templates for Ad Creation
- Reports

Tasks:
- Prep google ads. Build ads using existing templates - understand local and subcategories of every industry or business
- Set up new chiropractors based on the services they offer (ad groups)
- Do monthly maintenance according to the optimization training, and send out a report.
- Future task - train incoming VAs on the company's google ads process

Videos to watch: Create a 1-page summary.
- Social amplification Engine Guide
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- Course Builder Course https://f.io/TJKIkPfS
- Logic Engine https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be
- 32:34 to 58:00 of 23Dec2020 - PMC - Dennis Yu & Tristan Parmley.mp4
https://drive.google.com/file/d/1yZue5aGRpopISXI0OpqDoQhZugDiDupO/view?usp=sharing
-

Assessment:
https://docs.google.com/document/d/1R_uPBEN81HHSPy5Mr3A5upwkLZKt4ZxbrMU7g1t5GAs/edit?usp=sharing

Initial Screening: Juan

Final Screening: Dennis and Tristan

Role: Instructional Designer VA

Tools:
- Zoom + Loom
- Basecamp
- Adobe InDesign

Tasks:
- Update existing documents' linkages.
https://drive.google.com/file/d/1VQpNny9Apltp9_bHRvuSDv4wwnqfID_M/view
- Creates process documents from zoom training sessions. Update database of documents. Clean-up/Edit zoom sessions to make it instructional. Updates the software. Need someone who fully understands the 9 triangles training.

Preference: Get copies of applicant's past work added to the folder and sent over ahead of interviews.

Videos to watch: Create a 1-page summary.
- Social amplification Engine Guide
https://drive.google.com/file/d/1g_zDIblc44prgJYEy8oRNrWDdnmFuD4K/view?usp=sharing
- Course Builder Course https://f.io/TJKIkPfS
- Logic Engine https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be

- **Jan 29 PDC**
https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx
- 01Mar2021 - PDC - Process tracking and documentation.mp4

Assessment:
https://docs.google.com/document/d/1R_uPBEN81HHSPy5Mr3A5upwkLZKt4ZxbrMU7g1t5GAs/edit?usp=sharing

Initial Screening: Juan

Final Screening: Dennis and Tristan

Role: Process Development VA

Tools:
- Basecamp
- Infusionsoft
- GSuite

Tasks:
- Tunes team guides/courses, looking at the execution and turning them into checklists.
- Watch over the "pay per task" model currently rolled out to help audit task completion, troubleshoot where there are problems (largely in the process), and suggest improvements to how we qualify and train people.
- Test the software that manages the system.

Videos to watch: Create a 1-page summary.
- Social amplification Engine Guide
https://drive.google.com/file/d/1g_zDlblc44prgJYEy8oRNrWDdnmFuD4K/view?usp=sharing
- Course Builder Course https://f.io/TJKlkPfS
- Logic Engine https://www.youtube.com/watch?v=Sv3ipcJ0OQ0&feature=youtu.be
- **Jan 29 PDC**
https://drive.google.com/drive/u/1/folders/1G7CFdumEpVgnN9Cvsi2VVC8QBJe2-aHx
- 01Mar2021 - PDC - Process tracking and documentation.mp4

Assessment:
https://docs.google.com/document/d/1R_uPBEN81HHSPy5Mr3A5upwkLZKt4ZxbrMU7g1t5GAs/edit?usp=sharing

Initial Screening: Juan

Final Screening: Dennis and Tristan

Infusionsoft Automation

From email "Re: Dennis Yu and Tristan Parmley: Rocket Station Update"

Tristan Parmley:
Team - in addition to my last email, here's our automation for our pre-hiring flow.

This 6-minute video and provide feedback, please.
https://www.loom.com/share/8cdc5bbe562e464f94d693c012172cdf

It is 99% complete but needs to finish polishing up ROUND 4//Interview.

It should be good enough to start dropping applicants in.
https://vh913.infusionsoft.com/app/form/va-application is the link we will want to put on all job posts. This gives us a single entry-- cleaning up our multiple forms.

Our team has the training to take it from there on our side. Wanted you to see it because we will still keep onlinejobs.ph job posts live to get as many quality people to us as possible :)

Greg Brooks:

What I propose here: the link you provided to your initial screening questionnaire (https://vh913.infusionsoft.com/app/form/va-application) can we set Rocket Station up with our own landing page link. I'll cover the reason why below.

Process:

VA's graduate our internal screening process, Mina goes through candidates and matches skillsets with any positions you are hiring (say this happens on a Friday, which is when our "training batches" typically graduate).

Monday - she sends the survey link to all eligible VA's and they must review video content, submit written piece and fill out questionnaire within 48 hours along with attaching resumes and CV's.

Submit questionnaire - We need this Applicant registrant email (pass/disqualify) to be sent to our Placements Team (Mina), rather than back to the candidate directly. We will take any candidates that don't qualify and put them on interviews with our other clients. By having Placements and the central point of contact on our side, prevents any possible confusion (VA thinking they've been let go from Rocket Station because they didn't qualify).

48 hours later - Screening 1 interview with Juan for all candidates that passed and are approved (RS to facilitate all calendars, scheduling and prep)

From the video you sent on the current process, we would basically just need you to combo round 1 and 2 into 1 form, since we are taking care of a bulk of the screening on the front end. Once they submit written example and the form, infusionsoft could either notify Mina directly with who should be endorsed for round 1 interview OR have it go to Juan (or your ops team) and he could approve the PASS candidates and that will prompt Mina as to which candidates should move onto interview 1.

If you want to eliminate the round 1 interview with your operations team, we could also mirror your current "Round 3" written screening, and that would still keep us on target for a 7 day turnaround for new team members to get to Onboarding.

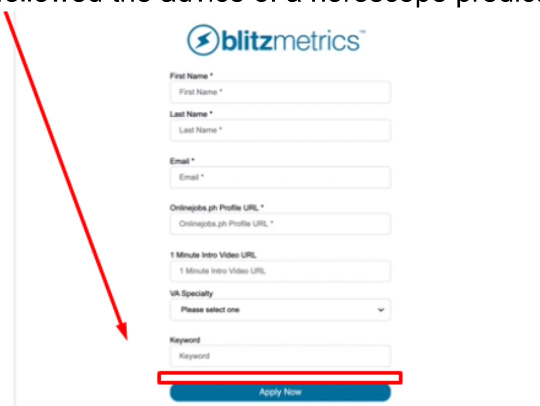
Juan Martho Agdan:

Here's my suggestion for phase 1.
1. The first phase should require an applicant to answer a quiz.
○ To make it simple, we can include only multiple choice questions or something like they need to write an answer similar to the "keyword" field.
○ If at least 1 answer is wrong, system disqualifies applicant, so they never go through manual review.
2. Applicant should include a link to their CV/resume.
3. VA Questions for RocketStation from BlitzMetrics contains questions that I wrote for RocketStation, where the applicant answers through writing.
○ The following questions can easily be converted to multiple choice questions: 3, 5, 6, 7.
○ Dennis and Tristan have approved all of these questions except for #3, which I added later. See Enumerate a list of Pre-interview questions for RocketStation to ask VA applicants for context.
Rationale:
1. Automated review comes first.
2. An applicant sends a CV/resume in the first phase to mask the fact that they got disqualified because of a wrong answer.
Remarks:
● I can probably rewrite some of the open-ended questions to make them multiple choice.

Infusionsoft V1 Updates (HIRING: Virtual Assistants)

Tasks: Round 1. (HIRING: Virtual Assistants)

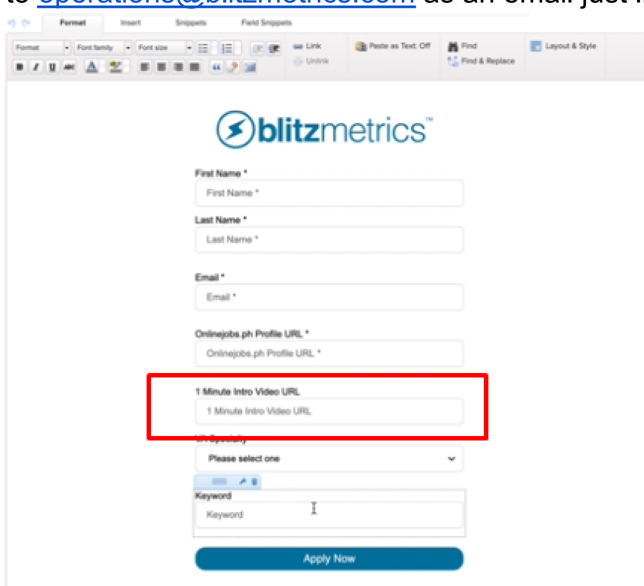
1. Create tags for Google Ads VA and Executive Assistant VA
○ We will essentially have 8 roles in the Infusionsoft sequence, even if we're not hiring for all 8 roles.
○ The roles are: Video Editor, Operations Specialist, Content Specialist, Designer, Community Management, Engineer, Google Ads Specialist, Executive Assistant.
2. In application form, replace "blitzmetrics™" logo with https://drive.google.com/file/d/1D8mMh0Le06IoNnMRFI41taN9PUFJOZe2/view
3. In application form, below "Email *", embed video "https://www.loom.com/share/27439d6feaad4975bd762dae4d5d0f49"
○ Should this be on YouTube or does Loom work well enough?
4. In application form, below "keyword", write text "Question 1. In the last 12 months, how often have you followed the advice of a horoscope prediction or advice?"



○
5. In application form, create either a drop-down or buttons that contain the following text:
○ "75 to 100%"
○ "50 to 74%"
○ "25 to 49%"
○ "0 to 24%"
6. In application form, create (a) trigger(s) that execute the round 1 disqualification sequence if applicant chooses an answer that is either "75 to 100%", "50 to 74%" or "25 to 49%".
○ The disqualification sequence does not execute until at least 2 hours after clicking "Apply Now".
○ I don't know Infusionsoft well enough to specify pseudocode or write finer details for each node.
7. In application form, create either a drop-down or buttons that have the following text:
○ "Question 2. Suppose that you are looking to hire someone for your business. There are 2 applicants—Alex and Taylor. Alex and Taylor are both qualified for the job. Alex is slightly more qualified than Taylor. An accurate report states that men are more likely to get hired than women. An accurate report states that men's average income is higher than that of women's. Taylor is a woman, while Alex is a man. Who will you hire?"
8. In application form, create either a drop-down or buttons that contain the following text:
○ "Taylor"
○ "Alex"
9. In application form, create (a) trigger(s) that execute the round 1 disqualification sequence if applicant chooses "Taylor".
10. In application form, create either a drop-down or buttons that have the following text:
○ "Question 3. Suppose that you are looking to hire someone for your business. There are 2 applicants—Jane and John. Jane and John are both qualified for the job. Jane is slightly more qualified

than John. An accurate report states that women are more likely to get hired than men. An accurate report states that women's average income is higher than that of men's. Jane is a woman, while John is a man. Who will you hire?"

11. In application form, create either a drop-down or buttons that contain the following text:
    - "Jane"
    - "John"
12. In application form, create (a) trigger(s) that execute the round 1 disqualification sequence if applicant chooses "John".
13. In application form, create either a drop-down or buttons that have the following text:
    - "Question 4. Suppose a company is looking for someone to promote to manager. The company can only promote 1 person. Alex and Kai are both qualified and deserving to be managers. Alex and Kai have worked for the company for an equal amount of time. Alex is slightly more productive than Kai. An accurate report states that those who have fair skin have a higher average income than those who have dark skin. Kai is a Filipino and has dark skin, while Alex has fair skin. Who should the company promote?"
14. In application form, create either a drop-down or buttons that contain the following text:
    - "Alex"
    - "Kai"
15. In application form, create (a) trigger(s) that execute the round 1 disqualification sequence if applicant chooses "Kai".
16. In application form, write the text
    - "Question 5. If you're given a task that you don't know how to do through email, what is the first thing you would do? Answer in 1 sentence."
17. In application form, create a field (empty box) for answers.
    - The answer should go to operations@blitzmetrics.com as an email just like the 1 min video link.



○

18. In application form, write the text
    - "Question 6. If you have a different opinion, belief or idea on a topic, how will you explain your case to your co-workers? Answer in 1-3 sentences.
19. In application form, create a field (empty box) for answers.
20. In application form, write the text
    - "Question 7. Suppose you are running a business and you're looking for someone to hire, what are the measurable things that you would look for? They may be observable either before hiring the applicant, or during the applicant is working for you. List no more than 10."
21. In application form, create a field (empty box) for answers.
22. In application form, write the text

○ “Question 8. What is your viewpoint on money? Share your viewpoint about money by providing 3-5 adjectives that describe it.”

23. In application form, create a field (empty box) for answers.

24. In application form, write the text

○ "Question 9. What is your viewpoint on socialism? Share your viewpoint about socialism by providing 3-5 adjectives that describe it.

25. In application form, create a field (empty box) for answers.

26. In application form, write the text

○ "Question 10. What is your viewpoint on capitalism? Share your viewpoint about capitalism by providing 3-5 adjectives that describe it."

27. In application form, create a field (empty box) for answers.

○ In application form, create a field (empty box) for answers.

28. In application form, write the text

○ "Paste URL to Curriculum Vitae here:"

29. In application form, create a field (empty box) for answers.

○ In application form, create a field (empty box) for answers.

30. In application form, write the text below:

"

1. Only watch 1 of the following depending on the role that you are applying for:

Executive Assistant VA

7:40 to 32:35 of 23Dec2020 - PMC - Dennis Yu & Tristan Parmley.

Video Editor VA

Jan 25 PDC

Content VA

Jan 25 and 26 PDC

Google Ads VA

32:34 to 58:00 of 23Dec2020 - PMC - Dennis Yu & Tristan Parmley.mp4

Designer VA

Jan 29 PDC

Process Development VA

Jan 29 PDC

2. Create a Google Document that anyone can view.

3. Write a summary between 3-7 paragraphs and no more than 10,000 characters.

4. Paste the URL to the Google Document below.

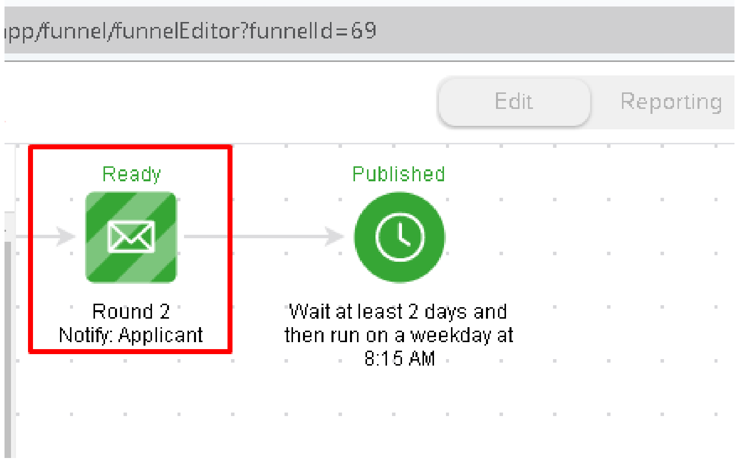
"

31. In application form, create a field (empty box) for answers.

32. Change the notification email to us when an applicant has submitted to contain the answers.

33. For email notifications to operations@blitzmetrics.com, change to rshiring@blitzmetrics.com.

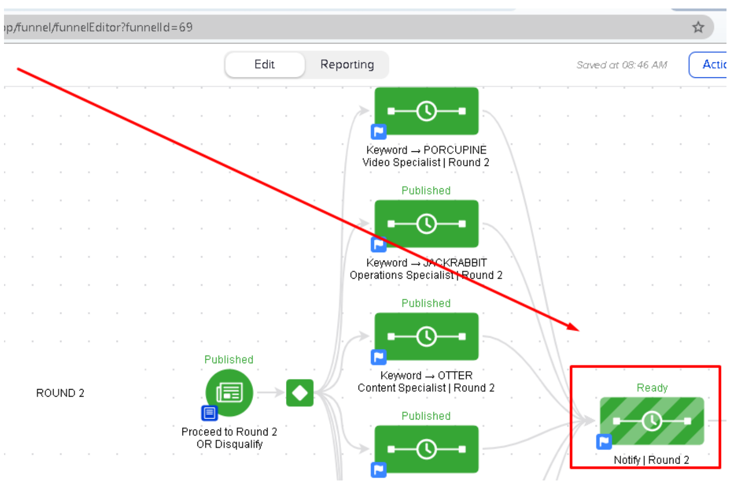
Tasks: Round 2 (HIRING: Virtual Assistants)



1. In “Round 2 Notify: Applicant”. delete text below:

“STEP 1:

Watch this video carefully to understand what we do and why so many companies want to work with us.



STEP 2:

Make a one-minute video about what you've learned, preferably posting it on your profile and including the video link - but sharing it using Dropbox, Google Drive, or unlisted YouTube video will work as well.

STEP 3:

Start a new email thread with the subject line:

"[~Contact._Keyword~] ~Contact.FirstName~ | Round 2 Submission"

Include a link to your video and send it to operations@blitzmetrics.com.

This is how we'll evaluate your ability to learn quickly, follow directions, and take action.

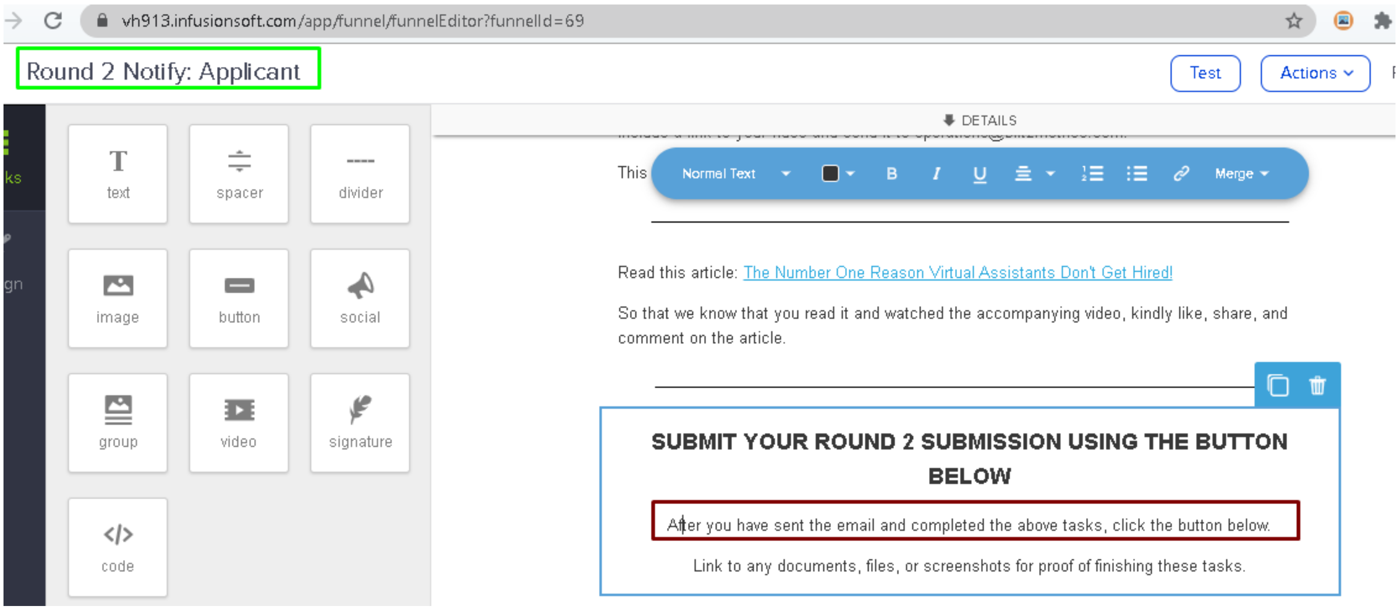
Read this article: The Number One Reason Virtual Assistants Don't Get Hired!

So that we know that you read it and watched the accompanying video, kindly like, share, and comment on the article.

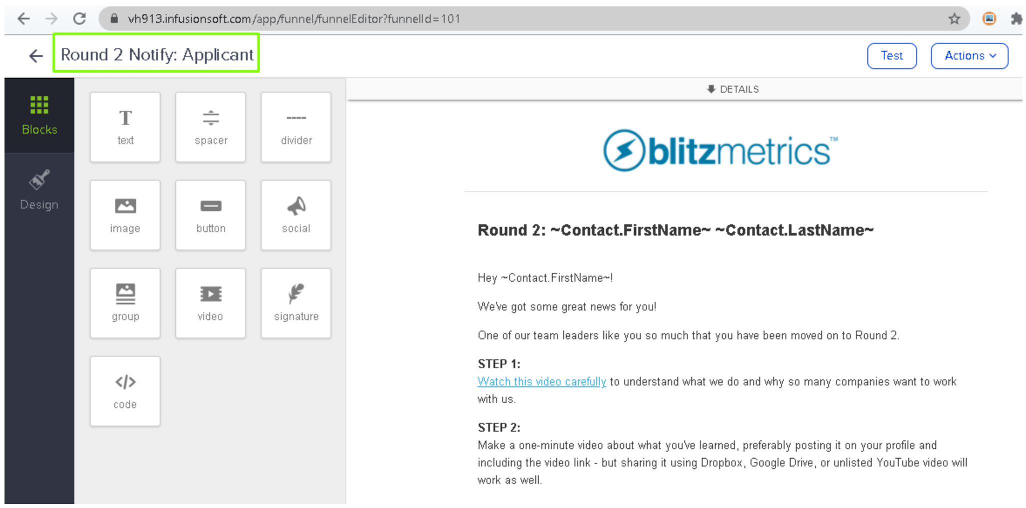
“

2. In “Round 2 Notify: Applicant”. change text below to

“After you have completed the tasks above, click the button below.”


vh913.infusionsoft.com/app/funnel/funnelEditor?funnelId=69
Round 2 Notify: Applicant
Test
Actions
text
spacer
divider
image
button
social
group
video
signature
code
DETAILS
This
Normal Text
Merge
Read this article: The Number One Reason Virtual Assistants Don't Get Hired!
So that we know that you read it and watched the accompanying video, kindly like, share, and comment on the article.
SUBMIT YOUR ROUND 2 SUBMISSION USING THE BUTTON BELOW
After you have sent the email and completed the above tasks, click the button below.
Link to any documents, files, or screenshots for proof of finishing these tasks.

3. In “Round 2 Notify: Applicant”, add the following text:



“

STEP 1: Watch this guide to understand what we do and why so many companies want to work with us.
Social amplification Engine Guide

STEP 2: Make a one-minute video about what you've learned, preferably posting it on your profile and including the video link - but sharing it using Dropbox, Google Drive, or unlisted YouTube video will work as well.

Step 3: Read this article: The Number One Reason Virtual Assistants Don't Get Hired!
So that we know that you read it and watched the accompanying video, kindly like, share, and comment on the article.

“

4. For email notifications to operations@blitzmetrics.com, change to rshiring@blitzmetrics.com.

Tasks: Round 3 (HIRING: Virtual Assistants)

For email notifications to operations@blitzmetrics.com, change to hiring@blitzmetrics.com.

Tasks: Final Round (HIRING: Virtual Assistants)

For email notifications to operations@blitzmetrics.com, change to hiring@blitzmetrics.com.

VA Questions for RocketStation from BlitzMetrics Multiple Choice for phase 1.

1. In the last 12 months, how often have you followed the advice of a horoscope prediction or advice?
○ Choices:
■ 75 to 100%
■ 50 to 74%
■ 25 to 49%
■ 0 to 24%; Correct
2. Suppose:
1. You are looking to hire someone for your business.
2. There are 2 applicants—Alex and Taylor.
3. Alex and Taylor are both qualified for the job.
4. Alex is slightly more qualified than Taylor.
5. An accurate report states that men are more likely to get hired than women.
6. An accurate report states that men’s average income is higher than that of women’s.
7. Taylor is a woman, while Alex is a man.

Who will you hire?
● Choices:
○ Taylor
○ Alex; Correct
3. Suppose:
1. You are looking to hire someone for your business.
2. There are 2 applicants—Jane and John.
3. Jane and John are both qualified for the job.
4. Jane is slightly more qualified than John.
5. An accurate report states that women are more likely to get hired than men.
6. An accurate report states that women’s average income is higher than that of men’s.
7. Jane is a woman, while John is a man.

Who will you hire?
○ Choices:
■ Jane; Correct
■ John
4. Suppose:
1. A company is looking for someone to promote to manager.
2. The company can only promote 1 person.
3. Alex and Kai are both qualified and deserving to be managers.
4. Alex and Kai have worked for the company for an equal amount of time.
4. Alex is slightly more productive than Kai.
5. An accurate report states that those who have fair skin have a higher average income than those who have dark skin.
6. Kai is a Filipino and has dark skin, while Alex has fair skin.

Who should the company promote?
○ Choices:
■ Alex; Correct
■ Kai

Open-ended questions

1. If you're given a task that you don't know how to do through email, what is the first thing you would do? Answer in 1 sentence.
○ Disqualify applicant if answer is not a sentence.
○ Disqualify applicant if answer is more than 1 sentence.
○ Disqualify applicant if answer is "ask" or something similar.
2. If you have a different opinion, belief or idea on a topic, how will you explain your case to your co-workers? Answer in 1-3 sentences.
○ Disqualify applicant if answer is not a sentence or not sentences.
○ Disqualify applicant if answer is more than 3 sentences.
○ Disqualify applicant if answer does not contain at least 1 of the following:
■ Reasoning.
■ Argumentation
■ Providing facts.
■ Providing numbers or figures.
■ Providing evidence.
■ Using logic.
■ Providing a rationale.
■ Sharing my thinking.
3. Suppose you are running a business and you're looking for someone to hire, what are the measurable things that you would look for? They may be observable either before hiring the applicant, or during the applicant is working for you. List no more than 10.
○ Disqualify if applicant provides more than 10 answers.
○ Disqualify if applicant does not answer at least 5 of the following:
1. Attendance.
2. Worked hours.
3. Sales.
4. Productivity, or output.
5. Efficiency, or output with respect to time.
6. Quality, or average deviation from expected output.
7. Number of good habits.
8. Low number of bad habits.
9. Percentage of met deadlines.
10. Occurrences of demonstrating independence.
11. Occurrences of demonstrating resourcefulness.
12. Occurrences of demonstrating adaptability.
13. Total number of met deadlines.
14. Percentage of fulfilled promises.
15. Total number of fulfilled promises.
16. Percentage of successfully followed directions, instructions or rules.
17. Total number of successfully followed directions, instructions or rules.
18. Number of suggestions for improvement.
19. Number of proposed solutions to problems.
20. Number of proactive and anticipatory steps taken.
21. Number of steps taken for personal development.
22. Low occurrences of procrastination.

23. Low occurrences of making disparaging remarks.
24. Low number of told lies.
25. Low number of confidential information revealed.
26. Intelligence Quotient (IQ) or occurrences of demonstrating being logical, analytical or scientific

4. Share your viewpoint about money by providing 3-5 adjectives that describe it.
○ Disqualify if applicant writes at least 1 word that is not an adjective.
○ Disqualify if applicant provides fewer than 3 adjectives.
○ Disqualify if applicant provides more than 5 adjectives.
○ Disqualify applicant if answer is at least 1 of the following:
■ Bad, Evil, Wrong, Terrible, Immoral, Unethical, Unscrupulous, Dishonorable, Wicked, Fraudulent, Crooked, Corrupt, Depraved, Indecent, Nefarious, Obscene, Sinful

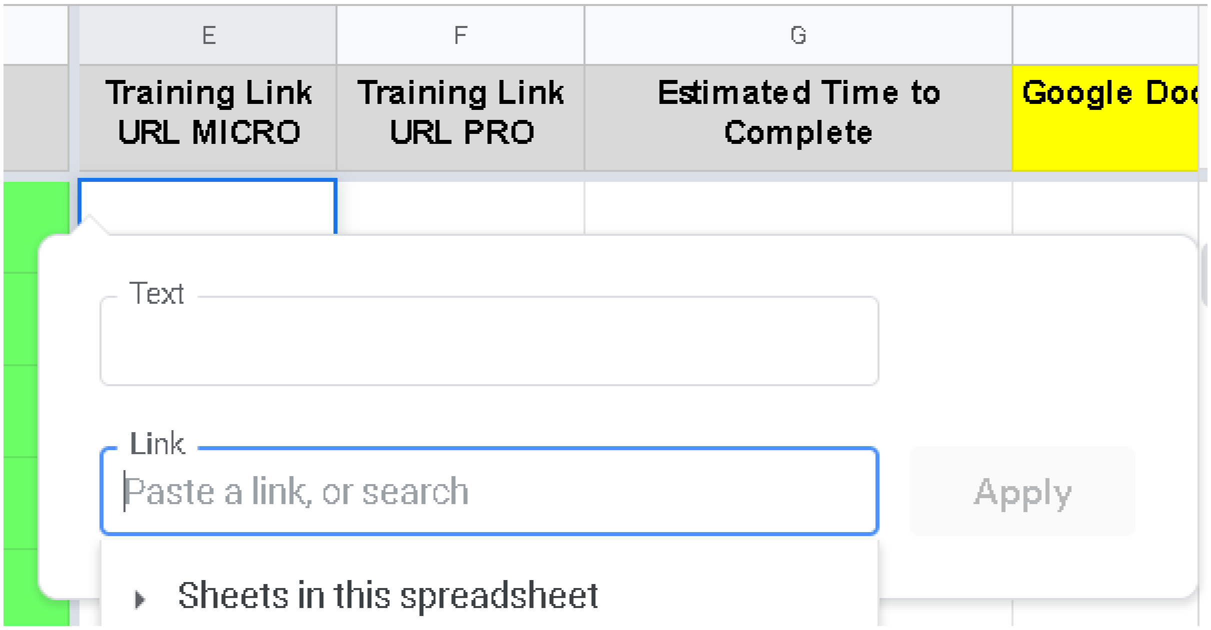
5. Share your viewpoint about socialism by providing 3-5 adjectives that describe it.
○ Note: An applicant's answer to this question is inconsequential. We only ask this question to prevent someone from figuring out which of the 2 systems we want them to view favorably.

6. Share your viewpoint about capitalism by providing 3-5 adjectives that describe it.
○ Disqualify if applicant writes at least 1 word that is not an adjective.
○ Disqualify if applicant provides fewer than 3 adjectives.
○ Disqualify if applicant provides more than 5 adjectives.
○ Disqualify if applicant
■ Bad, Evil, Wrong, Terrible, Immoral, Unethical, Unscrupulous, Dishonorable, Wicked, Fraudulent, Crooked, Corrupt, Depraved, Indecent, Nefarious, Obscene, Sinful

How To Update The 1,000 Task Library

1. For column “Training Link URL Micro”, fill in a cell by placing the document name and hyperlinking that cell with the URL to the document:
   - "Text"=Document File Name,
   - "Link"=URL

Example:

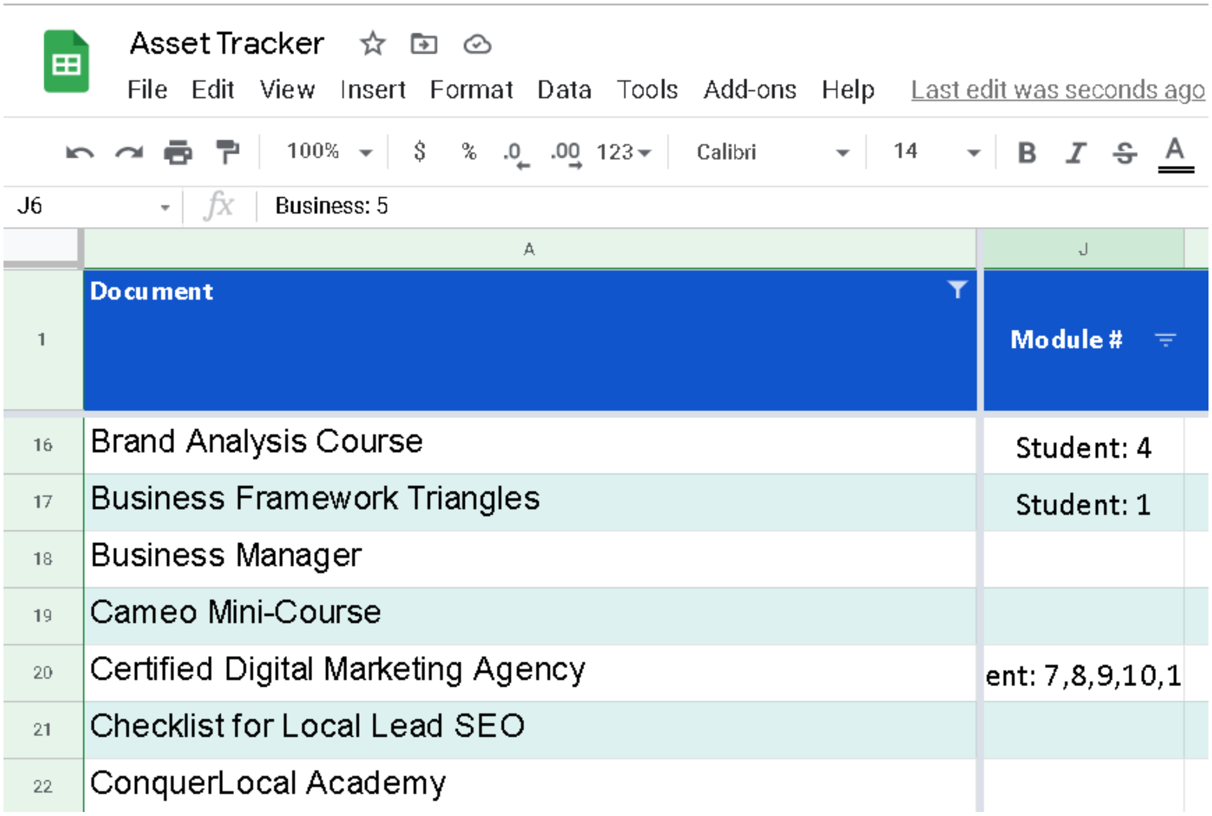


2. For column “Task Name”, write a complete sentence in imperative form without a period at the end, e.g

✅ “Package files in InDesign”

❌ “How to package files in Indesign”

3. Fill column "Module #" fill in the cell by referencing any of the following:
   - Module folder in the BM Assets folder.
   - Module folder in the CR Assets & Processes Folder.
   - Column “Module #” of the Asset Tracker’s Guide Doc tab.



- You can use this to determine which module # you should write by
1. Looking at which document is in a certain module
2. Looking at which training is at which document.
- For overview guides:
1. Cell value "1-18" corresponds to Master Guide Folder
2. Cell value "1-12" corresponds to Operations Process Guide Folder.
3. Cell value "1-6" corresponds to either Agency Management Course or Social Amplification Guide Folder.
4. Cell value "7-12" corresponds to the Digital Marketing Training System Folder.

Management

WHY

To ensure RocketStation meets BlitzMetrics-ChiroRevenue's metrics, analysis, and action expectations. The following points will help RocketStation track efficiency, equip Jojo to take on the day-to-day management, prevent missteps or miscommunications, and relay information in real-time.

WHO

Jojo Lopez, RocketStation Senior Operations Manager
Nina Sta Ana, RocketStation Head of Operations
Taylor Gnazzo, RocketStation Director of Business Operations

See RocketStation Contacts for a full list of RocketStation team members

WHAT

QUEUE TRACKER

RS PRODUCTIVITY Tab

Key Performance Indicator (KPI)

Key Performance Indicators			
Metric	Description	< 6 WK Goal	> 6 WK Goal
Tasks Completed / Hour	The total number of tasks completed per VA per hour.	3-4	6-7
Tasks Completed / Day	The total number of tasks completed per VA per day.	30	50
Task Occupancy	The total time spent working on tasks.	80%	80%
AHT	The average time it takes to complete one task.	15 minutes	10 minutes

The RocketStation team will utilize these KPIs to measure VA success. If there are any additional metrics you would like us to utilize, or change any of the below, please let us know.

End Of Day (Eod) And End Of Week (Eow) Report

ROCKET STATION X CHIROREVENUE EOD REPORT (DATE)						
VA PERFORMANCE						
KPI	VA NAME 1	VA NAME 2	VA NAME 3	VA NAME 4	VA NAME 5	TEAM AVERAGE
Daily Attendance						
Total Tasks Completed						
Task Occupancy						
Average Handle Time						
HELP NEEDED						
Any help/requests from Rocket Station to ChiroRevenue.						
AREAS OF IMRPOVEMENT/RED FLAGS						
Any areas of improvement noticed throughout the day and a small explanation of solution. EX: One VA's task occupancy dropped to 60%, coaching completed & continued monitoring throughout the day.						
COACHING SESSSIONS						
For visibility, list any coaching sessions VA's were pulled out for. List VA Name and time of session.						
VA/TEAM SUCCESSES						
All VA/Team successes for the day.						

At every start of a shift, the Senior Operations Manager—Jojo Lopez—will email you an EOD report from the shift prior.

Weekly, the Senior Operations Manager—Jojo Lopez—will email you an EOW report.

Email Subject Format:

“WORKLOAD EOD_DATE”

HOW

Coaching Sessions

The RocketStation Senior Operations Manager (Jojo Lopez) conducts coaching sessions to RocketStation VAs every 2 weeks that lasts for 30 minutes. During this time, the Senior Operations Manager discusses the following:
• The VA's performance,
• Areas of improvement,
• Team and VA wins,
• Updates from RocketStation or ChiroRevenue,
• VA's questions or concerns

If the Senior Operations Manager identifies a red flag or area of improvement during his or her daily check-ins, he or she will pull the VA for a coaching session in real-time.

Day-to-Day VA Management

The Senior Operations Manager—Jojo Lopez—will do all of the following:
• Use TimeCamp to monitor VA productivity in real-time. Check on the team at least three times per day, plus consistent monitoring via real-time chat.
• Reach out directly to the VA to identify the problem and develop a plan of action. If a VA is not meeting expectations
• Take the necessary actions and notate the event on the EOD report, if there is a manageable issue without assistance from a ChiroRevenue Point Of Contact (POC).
• Identify issues, which require assistance from a ChiroRevenue POCit as something that ChiroRevenue needs to be made aware of in real-time, he will reach out directly to Tristan (or another identified POC, please confirm).
• Notate common areas of concern or patterned struggles for further exploration & incorporation into process documentation (see RS PRODUCTIVITY TAB on QUEUE TRACKER).

Appendix

Pending Process Updates

---------- Forwarded message ---------
From: **Dennis Yu** <dennis@blitzmetrics.com>
Date: Wed, Sep 29, 2021 at 3:58 PM
Subject: Re: NEXT STEPS - Hiring your Rocket Station VA

Keep this going-- a lot of great details here to put in our process and start to actually use.

On Tue, Aug 17, 2021 at 6:37 AM Sean Musallam <sean.musallam@blitzmetrics.com> wrote:
100%! It sounds like good things happened here and we can still make use of them. I'm expecting to find some time later this week to read into this. Setting a 1 week boomerang just in case.

On Sat, Aug 14, 2021 at 11:06 PM Dennis Yu <dennis@blitzmetrics.com> wrote:
Study this not to see where things fell apart, but to salvage the instructions we provided, which they ignored.

Especially the Zoom calls where we detail process steps we want a project manager and VAs to follow-- so we have a well-oiled machine cranking out 30 tasks per VA per day with smooth, reliable communication along the way.

---------- Forwarded message ---------
From: **Tristan Parmley** <tristan@chirorevenue.com>
Date: Thu, Dec 17, 2020 at 3:56 PM
Subject: Re: NEXT STEPS - Hiring your Rocket Station VA
To: Greg Brooks <greg@rocketstation.com>
Cc: Robert Nickell <rob@rocketstation.com>, Dennis Yu <dennis@blitzmetrics.com>, Juan Martho Agdan <juan@chirorevenue.com>, Jeck Amodo <jamodo@rocketstation.com>, TAYLOR GNAZZO <taylor@rocketstation.com>, Mina Austria <maustria@rocketstation.com>, Nina Katlyn Sta. Ana <nstaana@rocketstation.com>, Jojo Lopez <jlopez@rocketstation.com>

Thanks Greg!

For our current VAs, could they go through your trainings to see if they are up to snuff?

We'd like to get everything centrally managed so we can focus on our key contributors over here.

We have a few team members working now and we know we are making the same mistakes we covered in our live call!

If so, what would that look like?

Lastly, I will be accountable for this. I am the main POC, with Dennis as guidance and back up. If somethings broken or we need whipped into shape, ultimately bring it to me.

Can't wait!

On Thu, Dec 17, 2020 at 2:52 PM Greg Brooks <greg@rocketstation.com> wrote:
This is FANTASTIC!! A lot to take in but our team will come ready on the 23rd.

So that we have everyone's roles clear here on the Rocket Station side, as well as what the process is going to look like from a timeline perspective, here you are.

Greg Brooks: I'll be your central point of contact through this from anything business strategy, bringing on new roles and verticals, scaling the team up etc. basically anything we need from a top level as we grow and scale quickly, that is my core role, to get you the results you're looking for as quickly and efficiently as possible. Any questions/anything unclear, come to me, ask, I'm always accessible

Jeck Amodo: Jeck is our head developer. Working on the granular details of all processes, documenting additional material, ensuring your virtual team members have exact clarity and documentation on both their job functions as well as how they fit/communicate/report to your managers/clients as a member of your team, she is our process guru and ties it all together on the backend. She has a team under her that support her in the deliverable, but she is your POC for anything and everything systems/process/checklist related

Mina Austria: She is our Placements/Hiring lead. When it is time to put you in front of candidates to interview and onboard, she facilitates all scheduling, prepping of the candidates and selection of the ones within our pool that are the absolute perfect fit. She will also be on interviews with your team during the interviews as a liason from start to finish. She works closely with Jeck to ensure skillsets, experience and personality types are going to match what the process is dictating.

Taylor Gnazzo, Jojo Lopez and Nina Ana: This is our operations team. Taylor specifically works with our clients that are hiring multiple positions at once to hold your hand through what we call the "calibration" period. Getting your Virtual Team members acclimated with their roles, communication with your team, software etc. She typically is with our enterprise clients 60-120 days, really to make sure as we launch your team, we are all marching to the same drum. Nina leads our operations team. Once we have successfully launched, her team (Operations Managers) handle all of the day-to-day of your Virtual Teams. Not only all of the day-to-day support of your team, but also all of the HR activities (making sure VA's report on time, provide correct feedback on their jobs... all of the annoying "people management stuff" that typically slows business down). The Operations Manager is also your central point of contact once we have launched. Meaning if roles change, if we need to do workforce management studies because workload is exceeding capacity, hiring more VAs, QA on existing team members, NPS scoring and reviews etc, this person is your B2B go to. I included Jojo as well just so that you are familiar with his name. Nina is actually expecting her second little one and will be out on mat leave, so Jojo is her senior most OM and will be filling in during her absence.

Just like you guys, we are a well oiled machine underneath. Every transition and step as we move to launch, calibrate and then maintain is a smooth transition, with clear communication. If anything is unclear to you and your team at any point, come directly to myself.

On Thu, Dec 17, 2020 at 1:32 PM Tristan Parmley <tristan@chirorevenue.com> wrote:
Team - here is our supporting documentation discussed on the call.

We have our own VA hiring process which I've attached first so you can see the 6 roles that are valuable in our company and what they do.

I've also attached our second most critical component, the Social Amplification Engine - this is our proprietary system that we implement/white label for agencies and brands world wide.

We know we want to help scaled Rocket Station - and this is a similar/same strategy we would be using with you guys, and our Digital CEO friends/certifications. With that there is the Personal Branding Guide, that we will use to power Rob.

chirorevenue_personal_branding_course_presentat...

I have attached our Digital Plumbing Guide, it is the start of the SAE. Without tracking, we cannot measure ROI, so this is a critical set up component.

As Dennis noted, we're looking for help right away with Google Ads, Executive Assistant, and Video Editing. For good measure, I've attached our 1200 page Master Presentation which includes all our processes, but the main components have been isolated in this email in order of importance.

I've received your email that includes a link to "What a VA can do for me." Do you have additional training under the hood of your machine so we can better adjust and get rolling right away?

Lastly, here is the Post-Live Recording of our zoom! Topic: Rocket Station, Post Live Details
Date: Dec 15, 2020 02:05 PM Pacific Time (US and Canada)

Meeting Recording:
https://us02web.zoom.us/rec/share/_atJnky9Fh4HM_Wyt_U-R0Tv_L-TRIf-aW76nUbZZmbXxQ-FuUOQK3ywXC2p8xao.DieX4YnDA2BK-Oke

DYSecret_Internal_Master_Presentation_v10.4_202...

chirorevenue_socialamplification_engine_guide_v...

On Thu, Dec 17, 2020 at 9:05 AM The Rocket Station Team <info@rocketstation.com> wrote:

We will review and be ready for the call on the 23rd. Met with our development team after our call yesterday. They are eager to get going!

Talk Soon!

On Wed, Dec 16, 2020 at 5:31 PM Dennis Yu <dennis@blitzmetrics.com> wrote:
Great-- we booked a slot for the 23rd, since you have no slots this week.

To prepare for the call, we highly recommend that the implementation team look over the checklist processes that Tristan has sent or is about to send over.

It will be too much to try to understand them sight-unseen, since we have in-depth training for each role.

On Wed, Dec 16, 2020 at 2:30 PM The Rocket Station Team <info@rocketstation.com> wrote:
Hi Dennis & Tristan,

Thanks for your time today! We can't wait to get started. The Meeting Minutes from our call is attached to this email.

Here's also the link to our Process Mapping team's calendar CLICK HERE to book that first call. This call typically takes 60 minutes.

The Client Service Agreement will be sent via EchoSign. Please read over, sign and click to return.

Just to let you know, the mapping and implementation is typically a one-time $1995 onboarding and set-up, but Rob and Greg realize the opportunity here both as a client as well as content creation so this is waived. We will send over a copy of the service agreement and will need to get a card or ACH on file, for once the VA's begin work. Please let us know your preferred billing method and we will send over the correct portal.

As we move through the process, rest assured that our team of Rocketeers will be there to assist you every step of the way. As you begin to plan out the future of your Virtual Assistant, CLICK HERE for an idea of all the daily tasks a VA can do for you.

Our pricing structure is very straightforward. Full access to all premium services, no hidden fees.

- Full-time VA's (40hr/wk) @ $10/hr
- Part-time VA's (20hr/wk) @ $12/hr
- Rocket Station operates as a service provider = no payroll hassles for you
- Rocket Station VA's will work in your software (Rocket Station does not provide CRM, phone lines etc)
- **NO LONG TERM CONTRACTS,** all contracts are month-to-month (15 day termination notice required)
- Invoicing on the 11th and 26th of every month, service billed in arrears (adjusted for tardiness and any employer negotiated bonuses, PTO, equipment, overtime, etc.)
- VA's will work in your time zone(s), schedules are flexible and pre-set by you

Get ready to BLAST OFF with your Rocket Station VA.

Thank you,

External VA Management

---------- Forwarded message ---------
From: **Greg Brooks** <greg@rocketstation.com>
Date: Mon, Feb 22, 2021 at 11:38 PM
Subject: Re: External VA Management

This is completely doable. From a management side, once we begin building out a management layer on your team, VA's from other areas (I'm assuming you mean countries) can slide right under and your dedicated manager can slot them right into the existing framework we are building.

The only thing we cannot do is pay salaries from Rocket Station or provide them benefits through Rocket Station if they are outside of the Philippines.

I think we will soon need to get you your own dedicated JoJo (team will be at 10 shortly), at which point we can slide any VA under that manager's framework and into our process and structure.

Talk soon!

On Sun, Feb 21, 2021 at 2:18 PM Tristan Parmley <tristan@chirorevenue.com> wrote:
We'd like to be able to pull in more VAs from other areas.

For example, we have one teammate [redacted], who needs tightly managed and a system of people to check in to.

We know that he would not qualify for the Philipino benefits, but we're still happy to move to pay up per hour to set him as an example for how all VAs can succeed with a management team like RS.

What should we do to help him and other members move into the system we're building together?

---------- Forwarded message ---------
From: **Tristan Parmley** <tristan@chirorevenue.com>
Date: Thu, Mar 25, 2021 at 9:01 AM
Subject: Re: Skill Assessments Embedded In Hiring And Leveling Up

Juan - please proceed. Add the assessments inside the courses and Master Docs themselves (Video Editing, Design, etc)

On Tue, Mar 23, 2021 at 10:52 AM Dennis Yu <dennis@blitzmetrics.com> wrote:
Excellent, Tristan.

Any prospective VA can begin the qualifying process to self-serve train.
Thus, to the candidate, our screening process feels less like interviewing (with the harshness of 95% not getting jobs) and more like learning that has a potential job if they meet criteria.

I was explaining to Juan yesterday how our standards are not lowering and how we're not providing free support/consulting. But, rather, we are making skills-based training more accessible to VAs, so that the ones who demonstrate enough interest and visible achievement are automatically invited by our system to apply for a job based on that certification.

Note that to be invited is not a guarantee of a job (they must still pass screening by a Juan, like before, and interviews and also assemble the materials in advance of this).

We are also not manually inviting to apply-- Juan and Tristan can set up triggers to invite them to apply. And if they say yes, give them pre-canned advice (video for encouragement, checklist for execution) on how to succeed.

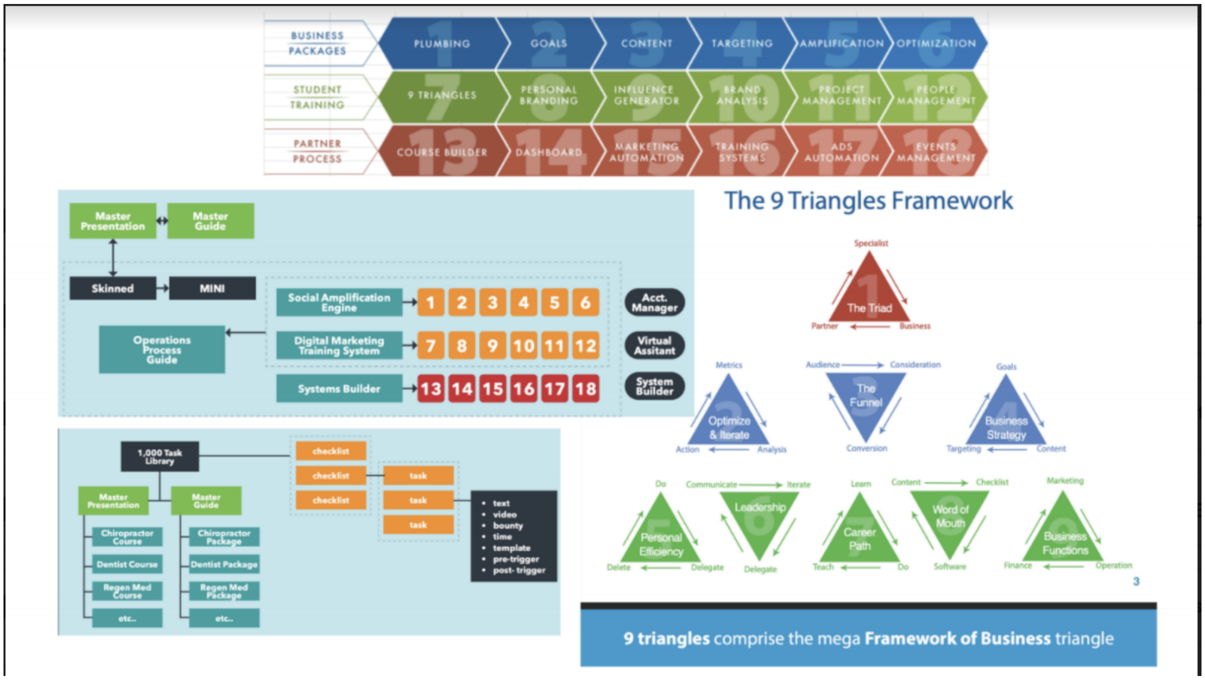
On Tue, Mar 23, 2021 at 10:42 AM Tristan Parmley <tristan@chirorevenue.com> wrote:
Team, soon we will need to skill assess everything as step 2 in the hiring process.

I've already laid this out partially with Juan.

To start, we'll make a simple assessment for Designers.

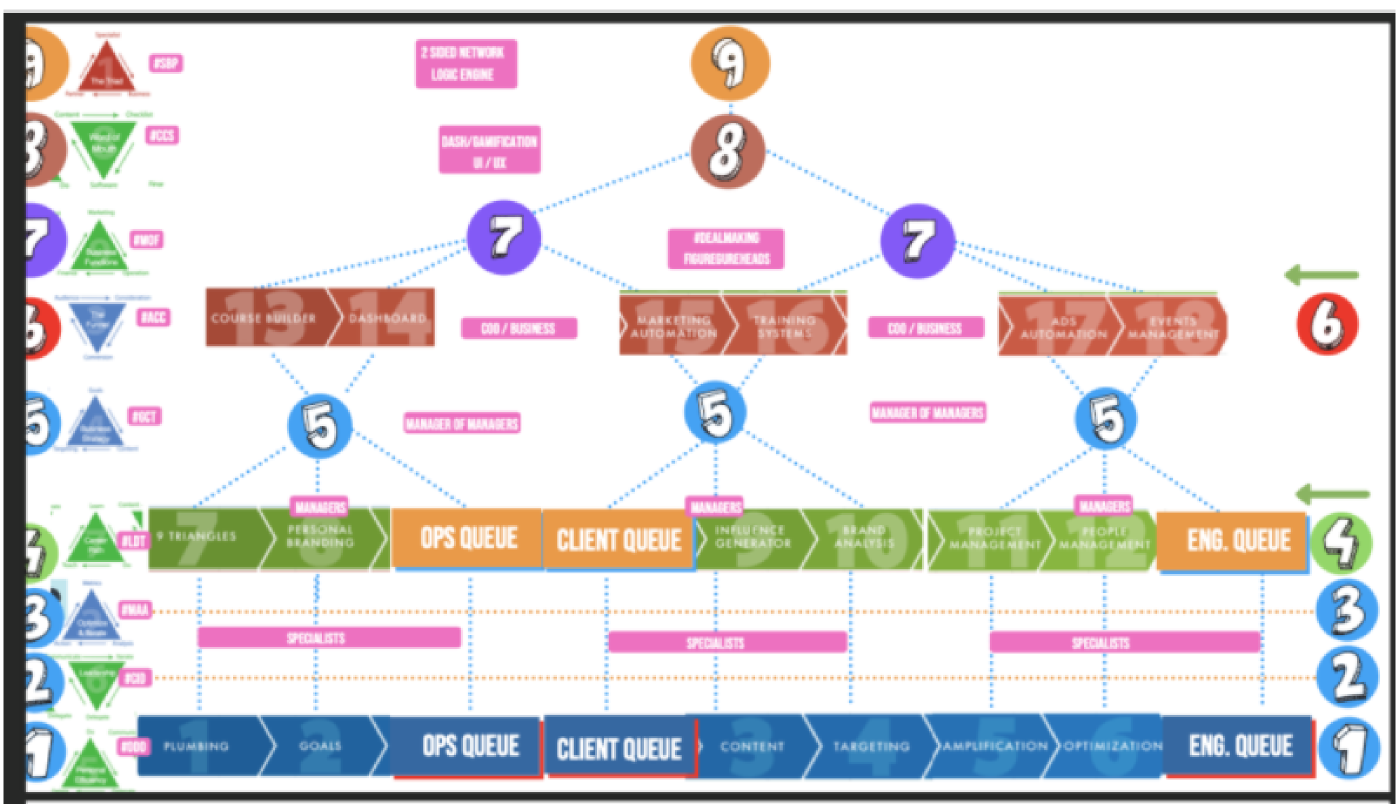
Which will be completing these 2 tasks (outside of Basecamp of course.)

1. Remaking this exact image in INDD. That simple - reMAKE, not re-design, so they work directly with our core principles from the beginning. Est time < 30 minutes.



2. [LVL2_ProDesign_CareerPath]

Which is converting this design (my canva slop) into something more like this (our branded look). Without giving them instructions or the finished version. Juan can collect the details and instructions. for the task to see how well they follow directions. Est time < 30 minutes.



It's simple, if they pass and submit it we welcome them on!

If they don't -- we suggest they spend some more time in training, design especially.

We will do the same thing for Operations, Video Editing, Advertising, and Content Writing -- a Level 1 and 2 assessment.

Level 3 will only assess when they're inside, which will require analysis of one of these operations. We want everyone to get to Level 3 which is why their written assessments when they come in are so important, so we know they can think.

However, we cannot afford to train completely unskilled people. They have to adapt the skills they already have to our system -- so once they pass to continue hiring, we will provide these assessments. The hiring process should take 2 weeks.

Week 1: All online training and assessments.
Week 2: Interviews, and onboarding.

Week 3: Tentative Hiring (Try out phase) with task quota of 10 per day.
Week 4: Tentative Hiring with taks quota of 20 per day.

Week 5: Full hire, 30-50 tasks per day.

Hiring Canned Responses