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with Barbara Best

Transcript: Outsourcing to Win (interview)

Barbara: Hi, I'm Barbara Best, and this is Humans Working Remotely. A podcast where I'll show you how to meet the expanding needs of your organization, by utilizing alternative solutions for operational staffing. Through expert insight and meaningful conversations with business professionals, we'll talk about common challenges and proven strategies that will provide you with more time to focus on your organization's mission, relationship building, and other high value growth activities.

With the robust technology available today, many businesses, nonprofits, associations and large corporations are being managed successfully using a remote support model. With strategic planning, process systems, effective communication and the right team in place, the delivery of administrative and financial support services are both cost effective and efficient. These support services can be just about anything, including finance and banking, web design, graphic design, administration and legal services and many more. I've invited my colleague Kerri Quirt to help me share some valuable tips to help you get started on the how of outsourcing, rather than the what or the why.

Kerri: Thank you, Barb. I'm so glad to be here with you.

Barbara: Welcome.

Kerri: Okay, so let's jump in, because this is your moment. The idea of successful remote working may be a hard concept for people to digest. So where would you suggest they start in considering remote work?

Barbara: Well, you have to start from the very beginning, you have to start from the basics. And that is to take a look at your business first of all, and then also your personal strengths and values. And you really have to be honest with yourself here. You may even want to ask people you know in your circles and networks. Maybe ask them what do they think I'm really good at and what do I really suck at. And then, you know, make a list from there. You've got to be brutally honest with yourself. That's the only way you'll figure out, and actually look on paper, what your plusses and minuses are. So, from there, it makes sense for you to develop a list. It would be an us and them kind of thing. I don't mean that in the literal sense. But I mean, well, if I'm really good at these things, and I like doing them, I'm going to keep doing those.

Kerri: Right.

Barbara: And then all this other stuff on the other side of the list, who can I delegate that to, that it makes sense for them to do it? And that would mean it would free up more of my time to do those things I love and grow the business at the same time. So, the first step really is to identify exactly what you need.

- Kerri:** Okay, that makes a lot of sense, actually. Now, so what's the main thing that you would encourage folks to keep in mind as to the process of utilizing remote workers.
- Barbara:** Top of mind for me is that people have to realize that outsourcing is a process that takes time and planning. It's not something where you've got a list of tasks and I say to you Kerri, okay, I don't want to do this stuff, here you do it. It's a lot more involved than that. And if you plan for it ahead of time, it really does save time in the long run with that planning that you do ahead of time. You have to plan for your needs. You have to tell people what your resources are. I mean what challenges you might be having and be always on the lookout for exceptional people through your circles and networks and ask for referrals, and that also includes family and friends if you are inclined to have that kind of relationship with family and friends. Not everyone does. So really, the point is to take time to find the right people for the right work. And my adage is hire slowly, fire quickly. Always works. Yes.
- Kerri:** Good plan. Okay, so many people I know consider themselves to be multitaskers. So, what would you say to those people who think they just have to find the remote worker and tell them what to do and walk away?
- Barbara:** No, doesn't work. It just doesn't work that way. It's not a set it and forget it way of getting things done. It's your business, you're responsible for it. You're responsible for everything that happens with it. So, to blatantly say, here you do it, it's business suicide, really. It makes no sense to do that. There's no purpose to do that. That's really just sort of giving someone something to do without any consequences. You're just kind of passing it off, as if it doesn't matter. That's not to say the resource doesn't matter. What I'm saying is that to do it just blatantly set it and forget it, it's that your heading for disaster because you really have to check in with your resource to make sure that they're doing the work, how you want them to do the work, they're reporting to you, they're checking in with you, letting you know of any problems that happen. And that's a fine balance too, because if you micromanage that resource too, the opposite can happen. You can be in their face so much, they're going to quit, because they don't want you to be in their face so much, you know, you've really got to find that balance and every person is different. So, you have to find a balance with how they like to work, how they like to check in, and you have to delineate what they're responsible for and what you're responsible for. And you really have to develop that trust between yourself and your resources.
- Kerri:** Right.
- Barbara:** So, some people may think, well, that takes a lot of time. Well, yes, it does initially, when you're first delegating tasks to someone, you want to make sure they're doing the right thing at the right time and reporting, and so on and so forth. But once they get in their groove, it's good. You can just let them go do their thing and check in periodically.
- Kerri:** Really, well. And again, the alternative is if you don't give them guidance, like the set it and forget it, then things are going to take a lot more time to fix. And if you do micromanage, then you end up losing them, you're going to set it again. It takes more time to have to find somebody else. And if you keep making that mistake, it's just going to keep repeating itself.
- Barbara:** Yep, absolutely. And I've seen it many, many times. That's exactly what happens. Yes. So, it pays to plan ahead and spend a bit of extra time on the beginning of your relationship.
- Kerri:** Right.
- Barbara:** Make sure everything's going smoothly and then you can let go, people know what they're doing. And they're adults and, you know, they need to know that they're part of a relationship with you.

Kerri: Yeah, and that's key right there. Okay, so you mentioned going smoothly. If things aren't going as smoothly as would be ideal, what might people ask themselves?

Barbara: Well, the classic situation is the bottleneck scenario. If things aren't going smoothly, I quite often ask myself, am I holding things up here? Is it me? Or is it you? You know that relationship thing, is it me or is it you.

Kerri: Right.

Barbara: So, you really have to, you know, check in and ask yourself, are you the bottleneck? A lot of business owners, because it's their baby, they gave birth to this idea, it's their business. They have all the knowledge in their head, and they want to do everything. So, for these people, it's hard for them to let go and delegate.

Kerri: Right.

Barbara: Having that knowledge. Because you're responsible for your business, having that knowledge is critical as well. But sometimes, most of the time, depending on the task, it's smarter to get out of your own way, and delegate the back office tasks. And to my first point, if you do that, it frees up your time to get on with growing your business, doing high value growth activities, doing the tasks you like to do, and then just getting on with it that way, you know, your back office stuff is done as well. And you're doing what you love to do. So, it really is about mindset more often than it is about logistics.

Kerri: Really? Yes. Okay. That makes that makes a lot of sense. Well, and like you say, many people do, especially business owners. So many of them, especially small business owners, they're so wrapped up and doing everything, and they were used to doing everything. But then there's other things that come that are not getting done, so you end up working in your business instead of on your business without delegation. Right?

Barbara: Right.

Kerri: Yes. So okay, so what would you suggest is one of the first things to do when talking about remote work?

Barbara: Well, if you find resources that are a good fit for you, first and foremost is to have an open conversation about what each of you expects. And I mean a frank and open conversation on the phone, on Skype, video, whatever it is.

Kerri: Right.

Barbara: And each of you in this relationship, by that, I mean business owner, nonprofit president, whatever it is, and the resource, have an open and frank conversation about what each of you expects in that relationship. How you operate, what your reporting is, how you like to work, where you work, in a remote support setting. Remote workers can work in places anything from a fully kitted out office in their house, right? Or they could be working from a dining room table. You really have to get into how they operate and what makes them productive, right, the circumstances that allow them to thrive in being productive. And the other thing too, is in that open conversation, the resource doesn't know what you know, as a business owner. So, they're looking at the tasks from different perspectives than you are. For example, as a business owner, I happen to know how an audit works for example, right? If the resource you're hiring is going to do the bookkeeping, that's great. They may be, you know, live for numbers and they do their bookkeeping in lightning speed and they do this and another thing, they haven't experienced going through an audit move. They're looking at the bookkeeping from a different perspective than I am. I look at it from an audit point of view, like what would an auditor pick up?

Kerri: Yes.

Barbara: And then looked at their books, right? A bookkeeper would look at it from the perspective of yes, I've got all my accounts numbered. I've got all the entries, they are triple checked, they've done a trial balance and this and that, everything's great. But they don't see that other piece of the perspective of an auditor. Do you understand what I mean?

Kerri: Yes, that makes sense.

Barbara: Yeah, and this holds true if you're hiring someone to do your bookkeeping, someone to cut your lawn even. They have a different perspective than you do on the same task.

Kerri: Yes.

Barbara: So, having those open conversations to identify deliverables, expectation is absolutely essential.

Kerri: Oh, good. Okay. How does a business and a remote worker ensure that expectations are clear?

Barbara: After that conversation happens, and hopefully both parties will take really good notes.

Kerri: Yes.

Barbara: From there, it's up to the business owner to create a specific contract that outlines exactly what you talked about, what the performance metrics are. What's expected. The remuneration, Terms and Conditions, confidentiality, security, who's going to provide what. We may have discussed that I would pay for their internet service while they're working for me, you know, whatever it is.

Kerri: Right.

Barbara: That has to be clearly stated in a document. And both parties have to review and sign that off. And if depending on the, I don't know, complexity if you will, of that agreement, it's a good idea to have those contracts reviewed by your lawyer.

Kerri: You know, I mean, yes, especially when it's business.

Barbara: Yeah, for sure. And you don't want to get into a situation where I thought you were going to do this, and you thought I was going to do that. It's just absolute chaos. And it's very expensive, and it's very time consuming to get into that situation. So, the best thing to do is head it off, you know, way before you get there.

Kerri: Yes.

Barbara: And, yes, that's what I would say is the best way to ensure maybe that the relationship starts off on the right foot, is to get a contract in place.

Kerri: And that comes from the communication too, right?

Barbara: Absolutely.

Kerri: Talking with somebody and saying, okay, well, let's be clear. You bounce the ideas back and forth. And then you come to the agreement, and then you put it on paper. And then it's like, here it is written here, you said, and I said and we agreed, makes total sense.

Barbara: Yes.

Kerri: Okay, next question. In this time of instant gratification, which we all suffer from, because that's what's afforded us, with the technology and the life we have, how do people manage frustrations when things aren't going as smoothly right away? I did all this, and I did all this and I followed all these rules. And it's not working and they're going to get so frustrated. I mean, I'm just as guilty as the next guy.

Barbara: Sure.

Kerri: But how would you suggest we manage that frustration when things don't go on point, right? How would you suggest that people manage that?

Barbara: Well, you have to, and this goes back to an earlier point, you have to take time to transition.

Kerri: Okay.

Barbara: It's not going to start in like 10 minutes from now. Everything is going to be absolutely smooth as we take on 10 different tasks that have a deadline of the end of the day. It probably won't happen.

Kerri: No, true.

Barbara: Because the person is learning how to do what you want them to do.

Kerri: Right.

Barbara: And it goes back into perspective, my perspective, and the resources perspective. They may look at a statement of work and look at and find something totally different than what you intended. So you really have to take time to transition, have discussions, discovery calls, where you might look at the contract or the statement of work and say, okay, you wrote here that I have to do 10 hours of bookkeeping in four hours. What did you mean by that exactly? And how was I going to do it? You know, it's just, you really have to work with your resource on the task and how you want things done, why you want it done? When do you want it done? It can be an open dialogue once again, with all stakeholders to discuss, you know, who's who in the zoo and when all this is going to happen.

Kerri: Right.

Barbara: Once that hand over, I'm getting ahead of myself. Once that discovery call is done, and the resources are confident they have all the information to do the work. They know who to contact, if they have questions, how they're going to contact that person for questions, and they have a level of security and knowing that they know what they're doing.

Kerri: Yes.

Barbara: Once that gets to that point, I feel that it's okay to let go and let them do their thing. They have to learn, right? And this happened to me recently, actually. You have to learn, and that means doing things in my context, not your context.

Kerri: Right.

Barbara: Right. And because it's a specific task, whatever it is you're working in, I don't know, an online application. Generally, the information is the same, but how we interpret that information may be different. So then that's where the checking in comes in.

Kerri: Yes. Yes. That's what I was thinking,

Barbara: Yes, you could say, "Okay, well, I've done the document that you wanted me to do. Here it is in rough draft. Let me know if I'm on the right track, and I'll finish the rest of it". You know that kind of thing. And there again too, it's up to the business owner, they're responsible for all the operations in their company, and they're responsible for the work that's done.

Kerri: Right.

Barbara: So, if you let the resource do their thing, we've got a check in scheme in place. Everybody knows what they're doing. You let go, let them do their thing. They learn. They solidify, and they have the confidence to do the work going forward. There shouldn't be any problems after that.

Kerri: Yes, true enough, but I'm also thinking though, if you imagine somebody in an office that's doing something and they say here, is this what you want.

Barbara: Yes.

Kerri: It's the same thing. So, I mean, it's the upper boss telling the employee type thing. Yes, this is what I want, or no, I need you to do it this way. So, it's also on the business owner to be in those communications and the intervals that they check in. They need to be reviewing how things are being done. So that it's not, it's not like hiring somebody to do your bookkeeping and then checking it after six months and saying, Oh, no, you're doing it wrong.

Barbara: Exactly. Right. Exactly. Yes.

Barbara: Yes. You have got to get in on the beginning on that, just to make sure everything's going the way you thought it would. They understand.

Kerri: Right.

Barbara: The resource understands the work that's involved. Maybe when I did a discovery call, I left something out. I don't know.

Kerri: Yeah, true.

Barbara: Yes. And you know, we are all human.

Kerri: Yes.

Barbara: A little bit of levity, brevity would be, you know, latitude is the word I'm looking for, a little bit of latitude. You have to and this goes into your next point I believe. I'm sorry, I'm going ahead.

Kerri: That's okay.

Barbara: You have to be prepared for a learning curve on the part of the resource. You have to be patient with them. Because there again, they don't know what you know. You know, I've run my business for 16 years, and if I hired someone new, they probably wouldn't know as much as me.

Kerri: No.

Barbara: So yes. Yes. It's all good, though. It's all good.

Kerri: So, what would you say the bottom line is? What's the bottom line about successful remote working?

Barbara: Bottom line? Because we're all human, it's all about relationships. That's what it is. Working with people, everybody's different.

Kerri: Yes.

Barbara: You have to not only build relationships but maintain them throughout the life of your relationship as well.

Kerri: Right.

Barbara: It's the same as building your business. You're doing networking things; you're meeting new people. You maintain those relationships, for you know, mutual benefit, whatever it is, it's the same with your resources as well. You really have to work at building relationships. Not all of them will work out. That's how it happens, that's life. But you still have to keep plugging on with that and look for the right team to put in place at the right time, for the right reason.

Kerri: Right.

Barbara: It'll totally work. Yes, for sure it'll work.

Kerri: Okay, thank you. Now, last question. No, second last. I know you have a few more things for people to consider. Tell me what those would be.

Barbara: You've heard that saying, you get what you pay for?

Kerri: Yes.

Barbara: It's still true.

Kerri: Yes.

Barbara: So, don't always look for the lowest price outsource solution, it may not be the best. And the other thing, the other side of that, is good people cost money. It's still true today. You always get what you pay for.

Kerri: Yes.

Barbara: So, it depends on what you're looking for, what area you're working in. The resources you need, the tasks you need done.

Kerri: Right.

Barbara: It depends on so many factors. But the bottom line is, you still get what you pay for.

Kerri: Yes. Okay, true.

Barbara: Yes. My other favorite one is, don't outsource a task just because you don't want to do it.

Kerri: It's so easy to think about though.

Barbara: There are things as a business owner or as an association, or a nonprofit, there are things that the business owner, or president, or executive, they have to do themselves.

Kerri: Yes.

Barbara: There's no getting around it. They have to work on the audit. That's just a fact of life. So, you have to be cognizant that you shouldn't outsource the task just because you don't want to do it. There has to be a better reason than that.

Kerri: Right. Okay, so.

Barbara: So, and number three, my third favorite all-time best tip, always strike a fair deal with you and your resource, and you always treat them with respect because they're handling important tasks for you. And you're responsible for those tasks being executed correctly. So, you know, like, don't take advantage of them. Don't use people just for the sake of using people. You should always be authentic and ethical in your dealings with your resources.

Kerri: Always, again, coming back to relationships, right?

Barbara: Absolutely. Absolutely.

Kerri: It makes all kinds of sense. Okay, so for the people who don't know you and your business, Virtual Works, can you tell them how you came by all this knowledge?

Barbara: Well, 16 years under my belt, that's a good reason right there.

Kerri: It is.

Barbara: My company, Virtual Works Inc., Total Office Management, has supported organizations of many different genres, sizes, business types, nonprofit, for profit, you name it, in the last 16 years. And we provide remote office support and financial support. And by doing so, we empower our clients by taking on those day to day tasks. And that frees them up to focus on leadership, relationship building, growth and success.

In closing, I'd like to thank you so much for listening today. I hope this information was helpful, and I look forward to providing more.

I'm Barbara Best, CEO of Virtual Works Inc.

There's a couple of action steps you can do:

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