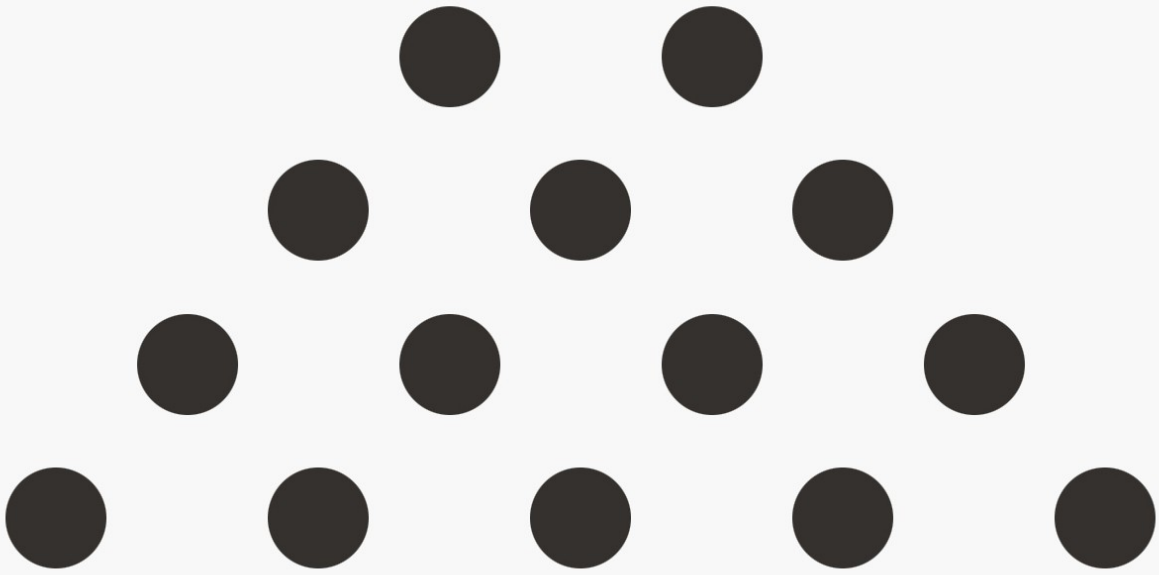
Unlock the Secrets to Leading Successful Remote Teams

The Remote Leadership Blueprint



PAUL HAWKINS

SIDEKICKS

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Intro:

Our family of companies began with remote work in mind even before remote work was mainstream. Well over a decade ago, the founder and my mother-in-law, Melanie Yeatts, loved working for an agent but also needed a way to be present for her children and grandchildren. Melanie tested the waters of remote work and found an incredible way to be efficient and effective for her agent, so much so that other agents in the area started asking what she was doing and if she could do it for them. With that, what would ultimately become Agency Resource Solutions was born. Her client list grew rapidly; and before long, she had more work than she could handle. In a move that I can only describe as a massive leap of faith, my wife and Melanie's daughter, Chasity, stepped away from her law career in 2012 to join Melanie and started a company built around helping families and agents--Agency Resource Solutions (ARS)!

Fast forward over a decade and ARS has grown to over 3500 agents with 1000 remote specialists nationwide. What an amazing testament to two mothers who wanted to be there for their children and still make a service-oriented impact! In 2023, Melanie, Chasity, and I started Sidekicks to provide more help to our agent community. Service is at the very core of our family and businesses, and we enjoy nothing more than helping others grow. In particular, we have a heart for business owners like you! We understand everything you have to juggle, and that list is long. There is so much to handle everyday as a business owner that can quickly take us away from family time, focusing on our team, and growing our business. The ARS and Sidekicks teams set forth to tackle that challenge and have our eyes and hearts set on helping as many agents as we can, if only briefly, give them time back in their day for their families too.

Additional background:
Over the past 20 years, I have been in the military, deployed to Iraq in defense of this great nation, been a program manager of complex and worldwide teams, and most importantly, have been behind the scenes with both ARS and Sidekicks assisting Chasity to make our offerings and experience as best as they can be for our agents. This book is one of those efforts and one I hope you find valuable. Throughout the past 20 years, nearly all of it, in one way or another, was done remotely, before remote was even a thing! Through that experience and with our family of companies, we have learned exactly what it takes to manage remote teams successfully. There is not a single team member in ARS or Sidekicks who live in the same town.

We are ALL remote!

Over our personal and companies' history, we have discovered the critical areas that have made agents successful with their remote teams. From team integration, to setting expectations to having clear communication plans, this book is meant to give you the blueprint for what works!

What can you expect from this book:
What it is not: This is not a quick fix. As with anything worthwhile in life, settling into the flow of managing remote teams takes commitment and time, but the benefits are worth the efforts!

What it is: My focus and intention with this book is to give you a clear blueprint of what has worked for remote teams nationwide: how to build your remote team, how to communicate, how to foster and develop remote relationships, and how to turn your remote team into an incredible, efficient part of your business.

By the end, I want to leave you with the confidence to build your dream team and then lead them effectively no matter where they are!

Part 1: Building a Remote Team

Building a remote team is not as daunting as it may seem. You review applications and hire new employees just like you would if they were in person. The only exception is that it is all done online or over the phone instead. That said, there are nuances to be aware of that can considerably help in not only finding great people, but also in retaining them. In this section, we will cover some background around the remote work movement and its benefits and best practices for recruiting and hiring.

Chapter 1: Understanding the Remote Work Movement

Remote work is not as new of a concept as one might think.

Many years ago, I built construction schedules for significant hospital projects nationwide after the military, and it was all done remotely. Certainly, I had to make frequent site visits to check progress, but the scheduled work, emails, and phone calls were all done from the airport, my house, and even on the side of the road.

And this was in 2006!

It was certainly much more challenging to work remotely back then, but the work got done. I thrived working at my own pace, from wherever I wanted, and ensured my clients received exceptional service… and all on 3G cell service. Remember those days? I still had an iPod and a Nokia flip phone if that tells you anything.

Now in 2024, I can look back on working remotely in some capacity for nearly two decades, with only a few exceptions along the way. The remote work movement has morphed over the years and gained considerable momentum during and after the pandemic, leading to a massive increase in remote work. Not to mention, the incredible technological advances and tools that came about out of necessity!

Despite the advances made, the same questions apply today that applied back in 2006:

- Can people work remotely for their companies?
- Will the work still get done?
- Will companies go out of business because their employees worked remotely?
- How will companies maintain control?
- Will it all fall apart?

When the whole world went remote during the pandemic, companies that could conduct business remotely were not as intimidated by the questions above as some other types of businesses were. Those who struggled were typically businesses with leaders and managers who did not trust their employees and had suffocating cultures of micromanagement. The ones that empowered their employees, set high standards, and trusted them to get it done did just fine and weathered the storm.

The result?

Most people figured out that they could not only work remotely, but could also drastically improve their home life by doing so. They could take their kids to school, get their laundry done during the day, and claw back two hours of commuting time every day. Employers found they could widen their net for talent acquisition, since they were no longer bound to their city, region, or even state and could find fantastic talent throughout the country. They could increase their working hours by having employees in different time zones, and they could decrease their overhead costs considerably by removing the need for a physical office space.

Cultural Shifts Driving Remote Work

The tilt towards remote work is being tipped primarily by cultural shifts and significant technological advances. Millennial and Gen Z employees are gaining considerable influence on workplace culture, and using it to focus on flexibility, autonomy, and better work-life balance more heavily than previous generations. Out with all the old, then? No, holding onto older traditions, in some cases, works great. But it is growing steadily harder, year by year, to make the argument that one must be in the office to be productive. The newer generations are already used to being connected nearly 24 hours a day. What does it matter if they make the report from home at 5 am or 8 pm, as long as it gets done? This is our new world, why not adust and embrace the change? In the end, it comes down to trust and accountability.

If you cannot see them, they must not be working...right?

How can you be sure a person will finish their work if you cannot physically see them? This presents a challenging shift in mindset; it is wonderful to have employees in the office, but what matters most is that the work actually gets done. Yes, this takes trust and a regular form of accountability, but luckily you can shape that destiny for the remote employee and team.

I once worked at a large corporation that told me that it would hurt my advancement if I were not visible, yet I had meetings all day long in different conference rooms across the building where no one could see me.

Did I really need to be visible? No.

Did they really see me throughout the day? Also no.

But did the work get done? Absolutely. The requirement was that I be in my cubicle at 7:30 or heaven forbid the work would not get done. Not my cup of tea. As an employee, it had the opposite effect: I felt micromanaged. I did not feel empowered. I felt that visibility mattered more than performance.

Question: Have you ever worked quietly at home and been far more productive than in the office?

I am willing to bet your answer is yes.

Society has shifted, and the workforce has received a small taste of what it was like to stop the madness of commuting. After expanding their horizons, many never want to narrow them again by returning to the confines of a full-time office. Periodic, in-person meetings have a great place with teams and the business. Past that, as long as the work gets done, I am satisfied. The world has changed and technology seems to change it more rapidly with each passing year.

Should we just stop meeting in person? Certainly not.

There is a balance to strike; we certainly cannot replace in-person interactions. Something about teams being together and shaking each other's hands is irreplaceable. Culture is critical to businesses, which means that coming together periodically really matters. There truly is a time and place for it and I advocate for it within our company. Over the years, I have found a golden rule for remote work:

- Work remotely and meet once every 4-6 weeks

This gives everyone just enough facetime to keep the personal and physical relationships fresh, while providing the environment for serious work to get done. Although I am a tremendous proponent of remote work, when done correctly, I also recognize the need for business owners to bring in their team for planning and comradery.

The short answer - It takes both. Considering the incredible talent you can get across the country, this is a wonderful tradeoff.

A Beginning Focused on Family

Over a decade ago, our family started a remote service business. That was well before any of this was popular. But we proved it could be done. We showed that you could find excellent talent nationwide to help clients. Most would scoff - that's impossible! It cannot be done. No one will hire a remote person. That is ridiculous! A decade later, we have thousands of clients and have trained more than a thousand men and women who saw their lives, and those of their families, change for the better.

In 2023, we did it again with a sister company, taking our decade of lessons learned and supercharged our remote work model. With both, our mission was to provide the absolute best service to our clients and to provide remote workers with a life far more balanced than ever before.

A mom comes to mind, who was able to be home with her small children and still make a difference. We had a grandmother who was still able to contribute, while dealing with health issues that prevented her from commuting. There was a father who was able to provide excellent service each day and find new time to become the author he had always wanted to be. And there have been countless other stories of what I can only call "divine intervention and timing" that dramatically impacted people’s lives, all made possible by remote work. The icing

on this cake? Our clients loved their remote specialists and received exceptional service; many have been with our company for years.

Sometimes, it really is all rainbows. But the thing about those is that they first require a little rain. Working remotely requires you to lean in further as a leader, and there are nuances that you must deal with. Yes, there are challenges, but the rewards are worth the effort.

For business owners, the time is here. Regardless of return to office mandates or changing economic conditions, our future will look different than the pre-remote days. Will you fight it, or embrace it? As recruiting becomes more complex and the workforce changes, being flexible and agile as a business owner is critical.

Consider the changes in technology of the past twenty years. In the early 2000s, we did not have the iPhone, barely had video chat, and Netflix was still shipping DVDs. Think about the world now. Seemingly everyone on this planet has a cellphone, and a smartphone to boot. Video chat is normal and quite reliable. Cable TV? Why? Just stream it. Artificial intelligence arrived and is quite literally changing the world. The point is that technology has increased exponentially.

What does this mean for you as the business owner?
It will become even more accessible for an employee to get the job done anywhere in the world. The internet is reliable and fast, even in remote areas now. Laptops are blazingly fast. Paper documentation is nearly obsolete, short of the junk mail in your home mailbox. The winners of this game will be business owners who do not fight change, but lean into it. Build your dream team of employees. And dream big, don't limit the possibilities for your draft. The next—and best—person you hire might just be 1,000 miles away.

Key Takeaways:

- Remote work is not new; it has evolved and proved its efficacy and efficiency long before the pandemic.
- Successful remote work relies on trust, empowerment, and clear communication between leaders and team members.
- Businesses that adapted and thrived during the pandemic often had flexible, trust-based cultures.
- Remote work offers lifestyle flexibility and a broader talent pool for employers, enhancing the quality of both personal lives and professional outputs.
- Embracing technology and shifting towards remote work, even partially, is beneficial and necessary in the modern business landscape.

Reflection:

- Reflect on your own experiences with remote work. What aspects have you found most beneficial?
- Consider the trust and communication dynamics within your team. How might these evolve to support a remote or hybrid work model?

Chapter 2: The Advantages of Remote Work

Is it really necessary to be in a suit and tie to send emails? There are situations, of course, where you would want to be professional and presentable (like a video call or meeting). Outside of that, I will just answer this with an *absolutely not*.

Unless you have strict security protocols, is your office the only place you could actually send that email? Probably not. You could send the email from your phone or your laptop at your house, or from anywhere else.

So I pose a question – what is the difference between emailing from the work office and emailing from the home office?

Nothing.

What about that paper you need to write, or the presentation you are giving next week, or the spreadsheet analysis of your financials?

You get the point.

Most service-based business transactions occur electronically, except for phone calls, in-person consultations, and site visits.

Should we therefore never meet in person again? Certainly not! There are wonderful benefits to in-person collaboration and planning. Especially when it comes to project plans, it really pays. While I worked remotely for over ten years, my recommendation to clients was to have people, including me, meet every 4-6 weeks. We would use the in-person week for highly focused project planning and problem-solving. Armed with the plan, the composite tasks, and the due dates, everyone would then head back to their respective corners of Earth and actually get the work done. It was fantastic. Planning? Complete. Collaboration? Complete. No distractions? Check. This is what I call the "Perfect Remote Blend." When sufficient in-person time meets uninterrupted and undistracted remote getting it done time in this way, bigger things are possible.

For me, it does not matter where the work gets done, as long as it gets done! It all comes down to control and trust, which is why business owners periodically get cold feet when it comes to hiring remote employees. In several upcoming chapters, I will detail techniques and processes to help you successfully recruit and hire the right, trustworthy remote employee (spoiler alert: it is easier than you think). There is a way to garner that trust you need, and I will show you what I did to make it work.

Years ago, I worked on some extremely challenging and impactful projects. It was insanely awesome work, and I could do 90% of it remotely. Following my four weeks remote and one-

week onsite approach, we saw RESULTS. Remote work was still available, even in situations that warranted great discretion, and our team thrived in it. I was able to find an affordable place to live, provide a wonderful lifestyle for my family, be close to support my parents, and still be highly impactful and purposeful at work. Every so often, I would travel to client sites to do hyper focused collaboration and planning, and then head back home to get the work done.

I took advantage of everything remote work had to offer, and my clients received exceptional service. After having proved my value time after time, they really did not care where I was. I could live in a mountain cabin for all they cared. I got the work done, and that was what mattered.

The current workforce, especially the up-and-coming generations, value their time more than ever and they already understand that getting the work done matters. The "where" and "when" typically do not. While some may scoff and think the younger generation does not work hard or does not want to work, I believe this to be incorrect. They want to work and, most especially, they want to be impactful and highly flexible. Why in the world would a 20-something want to commute two hours a day, wear a suit, and report to a cubicle?! They know better than anyone now that most of the work can be done anywhere. They grew up with smartphones, streaming services, FaceTime, etc. "Who cares where I am, as long as the work gets done?" is a valid question, and one we all must ask. The workforce is changing. How will we respond?

Bringing value to new employees as a business owner

More and more employees desire flexibility. So, what value do you bring to the table as a business owner? Are you offering flexibility and autonomy? How about demonstrating your desire to empower and trust your employees? Or are you just offering an open-plan workspace instead of cubicles and free kombucha? If I was 23 years old, I would know which option I would choose. For business owners, this can be hard to accept, especially if you have a brick-and-mortar office. I only advocate for an open mind to how you can greatly expand a killer team through remote methods.

Do not despair! Remote work also works well for you! It boasts significant advantages for you as a business owner. Here are several from my hit list:

- Broad, nearly unlimited reach into the talent pool so you can find the right person with the right skills - not just settle for the best you can find locally.
- Ability to increase your business hours—hire someone two time zones away, and you can increase your business hours by two hours EVERY DAY.
- Increased employee productivity – less distractions for them and more productivity for you.

There is also a distinct byproduct of having remote employees. Provided you treat them well, there is an even greater chance that they will be happier because their lifestyle will be better (refer to the not commuting part above). What does a happier employee mean? It means they tend to stay with you longer. A true advantage of having remote employees is that they tend to stick around, increasing your retention and decreasing your recruiting costs. Hiring people costs

lots of money - usually more than we realize. It also takes time, which is far more valuable than money.

How much time and money could you save if you increased employee retention? There are many other reasons why employees stay or leave—the number one reason is you, the leader. Do your part right, and people tend to stay. Do it poorly, and they do not, regardless of whether they are in-office or remote.

Increased Productivity

One typically creates a productivity machine when you hire the right remote employee. The positive effect of removing commute time and distractions adds up quickly, and your high-performing remote employees perform even more. A recent study reported in Forbes found that “workers who worked from home 100% of the time were 20% happier on average than those who didn’t have the ability to work from home.” That study also found “a strong correlation between work happiness and overall happiness.” Another study found that “people who have the opportunity to work remotely at least monthly are 24% more likely to feel happy and productive in their roles.”

Absolutely, there are certainly advantages to having in-office team members. Giving each other a high-five on Zoom is a bit cringe-inducing, building camaraderie is not quite as easy, and drawing ideas on a whiteboard together can feel a little bit off. These things are essential, but are now more than doable with remote employees due to our increased technologies, which are growing yearly. It has never been easier to hire and manage remote employees. We must also consider that with all the advantages of the in-office environment, comes a significant disadvantage - productivity. This tends to decrease because of the myriad of distractions at the office. Think of the last time you were working on something important, and your officemate randomly dropped into your office and asked about last night's game. Poof! There goes your flow and productivity. This frequent switching of contexts and tasks is a major time and productivity drain.

Cost Savings for Your Business

There are pretty much no perfect choices. Nearly every decision involves trade offs. Should you pay for an office or not pay for one? Should you buy new computers or used ones? Should you get the latest software or stick with the old stuff?

For business owners, the same decision-making process occurs when hiring a remote employee. Regarding total cost, the savings are astronomical. Your remote employee typically only requires a laptop, your company's software, and the benefits package you offer. Physical space is expensive… and risky. If you do not have to provide an office, a desk, a phone, drinks, snacks, parking passes, etc. for your remote employee(s), you can reduce the amount of physical office space you must pay for.

Bringing Value That Attracts Top Talent
What value do you bring to attract and retain top talent? Increasingly, the top requirements for new employees are flexibility, empowerment/autonomy, and making a difference. Are you offering those intangibles? What sets you apart? Think outside of the vacation time & 401k box!

Asking what you can do for them and not just what they can do for you is a question worth spending considerable time pondering. Do you provide flexibility to your employees? Do you empower them? Do you inspire them to make a difference in their work? Remote work managed correctly can do just that. My productivity skyrocketed once I went remote. I put in extra effort because it was the right thing to do and because I owned my schedule and time, which was and still is highly empowering. I am also happier because of it.

Empowerment and happiness = better me, and better me = I am crushing it at work.
That is the same mentality we instill in our remote employees, who are also crushing it.

Key Takeaways:

- Most service-based work is digital and can be efficiently done remotely, with occasional in-person sessions to bolster planning and problem-solving.
- Embracing remote work is not just about location flexibility; it is about trusting your team and relinquishing unnecessary control.
- Successful remote work strategies can increase productivity, employee satisfaction, and retention, benefiting the business's bottom line.
- Younger generations value flexibility, purpose, and autonomy, which can be effectively provided through well-structured remote work models.
- As a business owner, remote work offers access to a broader talent pool and the possibility of extending your business hours by leveraging different time zones.

Reflection:

- Think about the last time you had a burst of productivity. Was it in the office, or while working remotely? What factors contributed to this productivity?
- Consider how offering flexibility and autonomy could position your business as an attractive place for top talent, especially among the younger, tech-savvy generation.

Chapter 3 - The Power of Outsourcing

Time is everything!

As your business grows, your time becomes increasingly more important. I have found as I get older and more involved with our businesses, my time has become my most valuable asset. It is something I must protect at all costs - for my family, my life, and my priorities. Projecting your time is easier said than done, especially when you run a business.

There is so much to work on! So many responsibilities! The to-do list is endless.

Dan Martel does a great job outlining the idea of "Buying Back Your Time" in his book, and his concepts truly apply to the power of outsourcing your work when possible. Essentially, as we grow our businesses, we can "buy back our time" by delegating certain tasks and by outsourcing particular work. For example, I love cutting my lawn. It's relaxing and a great way for me to unplug into an hour or two of manual labor. However, when I do the math, my desire to cut my grass, even if it technically "saves me money" is indeed doing the opposite. If my time is worth $100 per hour, but a lawn team can cut my lawn for $100, it makes sense to outsource. Over the course of a month, I gain hundreds and hundreds of dollars back in time simply by paying someone else. I buy back my time so I can focus on sales, growing the business, or spending time with my family.

With outsourcing service work for your agency with ARS and Sidekicks, you get a 2-for-1 deal (I might even consider it a 5-for-1 deal):

- You outsource the recruiting of the employee
- You outsource the training of the employee
- You outsource the replacement of the employee if there are issues
- You outsource part of the shared labor cost to get a great service for a lower cost than finding a full-time in-office employee

Consider how much time you spend or would have spent recruiting, interviewing, licensing, and training that person. If they do not work out or quit, how much sunk time is lost? How much additional time is lost finding the replacement?

As with the landscaping analogy, I do not have to find another lawn mower if my breaks. I do not have to get gas for it. I do not need to get all of the lawn equipment. Furthermore, I do not need to spend 3-4 hours a week working in my lawn. I outsource all of it for a monthly fee, knowing that my lawn will be taken care of, and if there are any issues, I have someone I can call.

There are a few critical business positions that I do not recommend outsourcing such as the COO or Office Manager. For all other positions, I would absolutely consider it.

Another incredible option with outsourcing is the ability to scale more quickly. If you have a company who can provide the people, you can quite literally scale with money instead of

through time. It might take 3 months to find two great service people on your own. With good outsourcing, you can get both in the same week.

Great examples of areas to outsource:

- Service work
- Executive Assistant
- Payroll/Accounting/CFO duties
- Recruiting
- Social Media

My recommendation is to review your current business structure. What could you outsource? What can you do today to buy-back your time, even if only for a few hours? What things do you work on each day that should be delegated?

For growing and scaling our businesses, this is the number one thing to focus on - getting your time back to invest it into growth.

Key Takeaways

- Time is Your Most Valuable Asset:
    - As your business grows, your time becomes more valuable. It is important to protect and prioritize your time for both personal and professional reasons.
- Outsourcing Helps "Buy Back Your Time":
    - By delegating tasks and outsourcing work, you can focus on higher-value activities that drive business growth or allow more personal time.
- Delegate Lower-Value Tasks:
    - Repetitive business functions may be enjoyable but can often be outsourced, allowing you to use your time more effectively.
- Outsourcing with Services like ARS and Sidekicks Provides Multiple Benefits:
    - Outsourcing with professional services allows you to delegate the recruiting, training, and managing of employees, saving significant time and resources.
- Cost-Effective and Time-Efficient:
    - Outsourcing certain roles, like service work, can provide great quality at a fraction of the cost of hiring full-time, in-office employees, while also freeing up your time.
- Risk Mitigation in Outsourcing:
    - If an outsourced employee does not work out, the outsourcing company handles the replacement, saving you the time and effort of finding new staff.
- Outsourcing Supports Business Scalability:
    - Outsourcing allows you to scale your business faster by providing immediate access to talent. What may take months to do on your own can be done in days through outsourcing.

Reflections

- Take a hard look at your business. What could you outsource?

- If you could buy-back even 5 hours per week, would you do it? If you had that extra time, what could you do with your business or family?

Part 2: The First 30-Days

The first 30 days for a new employee, especially one who is remote, are the most critical. It is in the first month that relationships are formed, expectations are laid out, and company culture is instilled. As a business owner, this is your opportunity to make the very best first impression possible by:

- Setting the foundation of trust
- Providing a clear path of expectation management and accountability
- Providing an open and clear path of communication
- Making the employee feel overwhelmingly welcomed and important

Like any first impression, you have one shot to get it right. The good news is that we have created a step-by-step blueprint on how to do that, particularly for our Service and Executive Sidekicks. While these are specific to two of our types of Sidekicks, the principles can be applied in any remote employer-employee relationship. Read on for our recommendations on what those first 30 days with your new remote employee should look like!

Chapter 4: The First 30 Days - Executive Sidekick

Introduction
When hiring an Executive Sidekick, the "First 30 Days" make all the difference. This chapter is a comprehensive guide to help you establish a productive and fruitful working relationship with your Executive Sidekick right from the start. The first 30 days with your Executive Sidekick are crucial for setting the tone, building trust, and creating a solid foundation for long-term success, so we want to equip you and the Sidekick with a plan to make that happen!

This document outlines each week, step-by-step, covering how you can set the foundation, trust, and long-term success with your Executive Sidekick.

Chapter sections:

1. **The Importance of the First 30 Days**
2. **Week 1: Setting the Foundation**
3. **Week 2: Building Trust and Understanding**
4. **Week 3: Establishing a Cadence**
5. **Week 4: Refining Processes and Building Momentum**

Week 1: Setting the Foundation

The first week is about laying a solid foundation for a productive and successful working relationship with your Executive Sidekick. This is the time to establish clear lines of communication, set expectations, and build trust. Investing time and effort in these initial steps will ensure a smoother onboarding process and set your Sidekick up for success.
We recommend three major items for your first week:

- Welcome and introduce your Executive Sidekick
- Review how you run your business and its culture
- Review the first things you need for your Executive Sidekick and how you will communicate

Here is a detailed plan to guide you through the first week:

Welcome Your Executive Sidekick
Giving a warm welcome goes a long way! As with first impressions, the first week is critical to building the relationship between you and your Executive Sidekick. We recommend holding a call first thing to discuss how you run your business, your goals, your culture, and how you like to communicate. These items create the foundation for the weeks to come.

- **Schedule an Initial Meeting**:
    - **Naturally, the first thing to do is meet**! You can get to know your new Sidekick in this meeting and share your business' mission, goals, and culture.
    - Use this meeting to provide an overview of your team, their roles, and how they will interact with your Sidekick.
    - Provide an agenda for the meeting to keep it structured and focused.

- **Share Your Business's Vision, Mission, and Goals**:
    - Present a concise overview of your company's vision and mission. Explain how the Sidekick's role aligns with these objectives.
    - Discuss the company's short-term and long-term goals. Highlight any key deliverables, projects, or initiatives in which the Sidekick will be involved.
    - Encourage questions and feedback with your Executive Sidekick to ensure they understand your intent.
- **Provide an Overview of the Company's Culture and Values**:
    - Discuss the core values that drive your company's culture. Share examples of how your daily operations and decision-making reflect these values.
    - Explain any unique aspects of your company's culture, such as team-building activities, communication styles, and work-life balance policies.
    - Emphasize the importance of these values and how they contribute to the business's overall success.

Create a Clear Communication Plan

We all communicate in different ways, so discussing how you like to communicate with your Executive Sidekick is crucial. For example, some clients prefer texts and calls. Others prefer only email. Some prefer lists, while others are more visual. Some clients are detail-oriented and want lots of details. Others only want a quick summary to make decisions.

First, we recommend you take a moment and, if you do not know already, write down how you prefer to communicate and how you like to receive communications. Making this clear with your Executive Sidekick will go a long way in setting and managing expectations!

- **Establish Your Preferred Communication Method**:
    - Identify the primary tools for daily communication (e.g., email, chat applications like Microsoft Teams, and video calls).
    - Discuss and agree on the best times for communication, considering time zones and personal schedules.
- **Set Expectations for Response Times and Availability**:
    - Clearly outline the expected response times for different types of communication. For example, emails should be answered within 24 hours, while chat messages may require quicker responses.
    - Define your availability and preferred contact methods during and outside regular working hours.
- **Schedule Daily and Weekly Check-Ins**:
    - We recommend a quick daily check-in with your Executive to discuss priorities and progress. This is a chance for them to review what you need to get done, your meetings, and other critical items. At a minimum, we recommend having a weekly call with your Executive.
    - These check-ins can be 10–15-minute meetings held at the start or end of the day.
    - Use these check-ins to provide feedback, address questions, and ensure alignment on daily tasks.

- Encourage open communication and transparency with the Executive Sidekick to share any challenges or suggestions.

Review Initial Role and Responsibilities
You discussed and reviewed the responsibilities checklist during your onboarding call, and it is good practice to reference it during your first week. Our recommendation is to start with only a few items before tackling the entire list. For example, during the first two weeks, focus on the email and calendar and getting into your daily/weekly rhythm. Add the reports and other functions later in the month.

- **Reference Checklist Call**:
  - Use the initial checklist call to ensure all administrative tasks are completed, such as setting up account access to your email and calendar, providing access to necessary software, and completing HR documentation.
  - Please verify that the Sidekick has all the tools and resources they need to begin their work.
- **Review the Sidekick's Role and Responsibilities**:
  - Clearly outline the tasks and duties expected from the Sidekick. Provide a detailed job description and discuss any immediate priorities.
  - Explain how their role fits into the larger team and company structure.
  - Highlight any key projects or tasks that require immediate attention.
- **Discuss Short-Term and Long-Term Goals**:
  - Set clear, achievable goals for the first 30 days and beyond, giving the Sidekick direction and a sense of purpose.
  - Ensure you have a meeting cadence to assess progress and adjust as needed.

By focusing on these foundational steps in the first week, you can create a structured and supportive environment for your Executive Sidekick, setting the stage for a successful and productive working relationship. Clear communication, understanding roles, and aligning on goals are essential, as they are the building blocks for trust and efficiency in the weeks and months to come.

Week 2: Building Trust and Understanding

As you move into the second week, the focus shifts to deepening the working relationship with your Executive Sidekick. This week is crucial for establishing trust and understanding between you and your Sidekick and ensuring they are fully integrated into your personal/business workflows, familiar with the necessary tools and processes, and comfortable taking on their responsibilities.

Here is a detailed plan to guide you through the second week:
Review the previous week and introduce it to your team.

- **Review the previous week**.

    - Communication: At the start of the week, spend some extra time with your Executive Sidekick reviewing how the previous week went. Did you both communicate well? What should you adjust or change?
    - Emails/Calendar: Look at your email and calendar together. Are emails handled the way you would like them? Should the Executive adjust how the emails are organized (folders, flags, color codes)? If all is well, great! If not, use this chance to make the change for the week.
    - Access: Does your Executive have access to everything they need to help you? Do a quick spot check and see if anything is missing.
- **Introduce your Executive Sidekick to your team**.
    - Schedule a call with the entire team and introduce your new Sidekick. This introduction can be short and sweet! Use this opportunity for everyone to:
    - Let the team know that you have a new Executive Sidekick.
    - Put faces with names. Identify specific team members that the Sidekick will regularly work with if required.
    - Clarifying your business workflows and priorities
- **Explain the Workflow and Approval Processes**:
    - Clearly outline your company's workflow and approval processes for tasks and projects.
    - Provide examples of how tasks should flow from initiation to completion, including necessary checkpoints and approvals.
    - Ensure the Sidekick understands who to involve at each stage of the process and how to handle any bottlenecks.
    - **For example,** you may have a specific day/time that you need your reports completed each week/month. Run through how you currently handle these in your business so that the Executive can meet your expectations.
- **Clarify How to Handle Urgent and Non-Urgent Tasks**:
    - Provide guidelines on prioritizing and handling urgent versus non-urgent tasks.
    - Explain your expectations for response times and the escalation process for urgent issues.
    - Ensure the Sidekick knows who to contact in case of emergencies or when they need immediate assistance.

Outline the priorities for the month.

- **Outline Key Tasks and Projects for the Month**:
    - Identify the most critical tasks and projects the Sidekick should focus on for the month.
    - Provide detailed instructions and context for each task, explaining how they contribute to the larger business objectives.
    - Set deadlines and milestones to ensure timely completion of these tasks.
- **Confirm the timing of reports and deliverables**.
    - Review the reports the Executive Sidekick will complete for you and confirm their delivery dates.

- Confirm how the Executive will get the reports (self-generated, something you must provide them, or input they should collect from the team).
- Confirm how you would like to see those reports. Do you need additional summaries? Is there a different format you need them in?

This week is about confirming your initial expectations and communication and building confidence in your Sidekick's abilities to ensure they feel supported and valued as crucial team members. Establishing this trust and understanding early on will pay dividends in the long run, creating a strong foundation for future collaboration and success.

Week 3: Establishing a Cadence

Week 3 is about setting a rhythm and cadence with your Executive Sidekick. You should have confirmed expectations, priorities, and duties with your Executive by now. This week, we add additional responsibilities and create a structure to ensure the two of you are in lockstep! Building a routine and cadence helps maintain momentum and sets the stage for ongoing productivity and success.

Here is a detailed plan to guide you through the third week:

Adding More Duties

- **Add All Reports Not Already Added in Week 2**:
  - Review any additional reports or documentation not included in the previous week's tasks. Is there anything left to add to your Sidekick's plate?
  - Provide clear instructions and templates if necessary, ensuring the Sidekick understands the purpose and expectations for each report.
  - Schedule regular intervals for these reports to be completed and reviewed.
- **Add Additional Duties Agreed to During Onboarding**:
  - Revisit the initial onboarding discussions to identify any additional duties agreed upon. For example, if your Sidekick will help you with payroll, this is the week to start.
  - Introduce these tasks gradually to avoid overwhelming the Sidekick, providing training and resources as needed. By the end of the month, all tasks outlined in the onboarding should be handed over.
  - Ensure the Sidekick is comfortable with their expanding role and responsibilities, offering support and guidance as they take on new tasks. Please note – they also have an entire support staff via Sidekicks to help with reports, issues, and any learning gaps, and we also provide weekly training to the Executives.

Set the Meeting Cadence

- **Daily and Weekly Check-ins**:
  - Everyone differs in the amount of check-ins desired, but we recommend a quick 5-10 minutes daily check-in with your Executive.
  - The Daily Check-in can cover the priorities for the day and any urgent items.

    - Schedule weekly check-ins to review task progress and discuss any challenges or roadblocks encountered. We recommend holding a 15-30-minute call with your Executive to review the items completed that week and to make a quick plan for the following week.
    - Use these sessions to provide feedback, offer assistance, and adjust priorities as necessary.
- **Monthly Planning:**
    - As with the Weekly Check-in, we recommend scheduling a monthly review and planning call with your Executive.
    - Go through the accomplishments for the month and plan for the items that need to occur the following month. This is an excellent time to review upcoming travel, when reports are due, and any expected schedule conflicts.
- **Monthly Team Retrospectives**:
    - We also recommend scheduling a Monthly Team Retrospective with your whole team to review What went well, what needed improvement, and what you will do immediately next month.
    - Having your Executive on this call as an active participant is excellent for including them in the team culture and allowing them to understand the ins and outs of the month from the team's perspective.

Focus on Encouragement and Initiative

- **Empower the Sidekick to Take Initiative on Projects**:
    - Encourage the Sidekick to take ownership of specific projects and tasks, allowing them to demonstrate their skills and capabilities.
    - Provide clear guidelines and expectations, but give them the autonomy to make decisions and take action.
    - Recognize and reward initiative to reinforce this behavior and build confidence.
- **Encourage Them to Suggest Improvements or New Ideas**:
    - Create an open and supportive environment where the Sidekick feels comfortable sharing their ideas and suggestions.
    - Actively seek their input on improving processes, workflows, and overall efficiency.

Establishing a consistent cadence with your Executive Sidekick in Week 3 is critical for maintaining alignment, building momentum, and fostering a productive working relationship. Adding more duties, setting regular check-ins and reviews, and encouraging initiative ensures that your Sidekick is fully integrated into your team and empowered to contribute to your business's success. This foundation will support ongoing collaboration and help you achieve your goals effectively.

Week 4: Refining Processes and Building Momentum

Week 4 is your chance to review the month with your Executive. This is a time to review the deliverables, your collaboration, and communication and to make adjustments for the upcoming

month. This month focuses on conducting the monthly retrospective and planning, which was discussed in week 3. If nothing else, please do this with your Executive. We have found that spending 30 minutes reviewing expectations, what went well, and what needs to be improved goes a long way!

Here is a detailed plan for Week 4:

Conduct a Monthly Retrospective

- **Conduct a Review of the First 30 Days**:
  - Schedule a meeting (your Executive should do this for you!) to review the first 30 days of working together.
  - Use this time to reflect on the initial onboarding process, communication practices, and overall performance.
  - Ensure the Sidekick feels comfortable sharing their experiences and feedback during this review.
  - Discuss the duties of the Sidekick – What should you add? What should you remove? What is working, and should it stay the same?
- **Discuss What Worked Well and What Could Be Improved**:
  - Identify the successes and positive outcomes achieved during the first month.
  - Discuss any challenges or obstacles encountered and explore potential solutions.
  - Encourage the Sidekick to share their perspectives on what worked well and areas where they believe improvements can be made.
- **Celebrate Successes**:
  - Take the time to acknowledge and celebrate the achievements and milestones reached in the first 30 days.
  - Recognize the Sidekick's contributions and efforts, reinforcing a positive and motivating work environment.
  - Share positive feedback from the team or clients to boost morale and confidence.
- **Adjust Goals, Tasks, and Processes as Needed**:
  - Based on the retrospective discussion, make any necessary adjustments to goals, tasks, and processes.
  - Ensure the Sidekick understands any changes and has the resources and support needed to implement them.
  - Set clear expectations for the next month, focusing on continuous improvement and growth.

Conduct Planning for Next Month

- **Set Goals and Objectives for the Next Month**:
  - Review the goals and objectives for the next month
  - Review upcoming travel and other commitments that may conflict with the business goals and priorities
  - Discuss and capture the priorities for the month

- Discuss and capture adjustments that need to occur – meetings, communication, etc.

Moving forward, we recommend repeating Week 4 each month! A recurring Monthly Retrospective and Planning session will keep both of you aligned and help significantly reduce communication and expectation issues. As a bonus, this also helps you consistently review and improve!

Conducting a thorough monthly retrospective and engaging in long-term planning can refine your processes, celebrate successes, and build momentum for continued growth. This week sets the stage for a productive and successful partnership with your Executive Sidekick, ensuring they are well-equipped to contribute to your business's long-term success. Use this time to foster a collaborative and supportive environment where your Sidekick feels valued, empowered, and motivated to excel.

Chapter 5: The First 30 Days - Service Sidekick

Introduction

When hiring a Service Sidekick, the "First 30-Days" make all the difference. This document provides information to help you establish a productive and fruitful working relationship with your Service Sidekick right from the start. The first 30 days with your Service Sidekick are crucial for setting the tone, building trust, and creating a solid foundation for long-term success, so we want to equip you and the Sidekick with a plan to make that happen!

Schedule an initial 1-on-1 meeting with your Sidekick
Although the Service Sidekick program is a “Plug-and-Play” service, building a rapport with your new employee is crucial! We recommend scheduling a 1-on-1 meeting with your new Sidekick shortly after your onboarding call to review additional items specific to your business. In this 1-on-1 meeting, we recommend you cover the following:

- Your business vision, mission, and goals
- Roles and responsibilities of your team and its structure
- Your communication plan
- How you will introduce your Sidekick to the team

This meeting should only last about 30 minutes, but it is a great way to start with your Sidekick. At the end of the meeting, your Sidekick should be clear on how you want to communicate, who they should speak with, what your goals are for the business, and what expectations you have for them. Expectation management goes a long way, and this single meeting can help greatly!

The 1–on-1 Meeting

- Share your business vision, mission, and goals.
- We have found that remote employee responds very well to understanding their role in the big picture. As a business owner, take this chance to outline your goals and vision for your agency. What are your goals for the year? How do you see service fitting into those plans and goals? Outlining how the work performed by the Service Sidekick relates to your plan for growth, retention, and customer satisfaction goes a long way to helping remote team members understand their impact. For example, explaining how your internal policies and templates interact with customers can help the Service Sidekick understand how meaningful those interactions are. Help them buy into your vision!

Review roles and responsibilities.
Our team covered most of the direct roles and responsibilities of the Service Sidekick during your onboarding call, but there are often specific responsibilities specific to your agency. This is the time to outline your office and team structure, including:

- The roles and responsibilities of your team
- How your Service Sidekick fits in that team structure
- How your Service Sidekick will communicate within the team as well as externally

Review the communication plan
Everything starts with communication! You may already have a communication plan for your business and team, but if not, now is the time to make one. Creating a communication plan does not need to be complex and time-consuming. Just some basic rules and guidelines around how to communicate, when to communicate, and who to communicate with go a long way.

During your initial meeting with your Sidekick, review your communication methods, expectations, and team structure. In this meeting, clearly articulate how you want your Sidekick to communicate with you and your team. This should include who they will work with directly, who they might report to if it is not you, and how often you expect them to communicate with the team. You may also desire to have the Sidekick share their productivity each month. Whatever reporting you require for your service team, ensure you outline your expectations for your Sidekick.

Reviewing these items during your one-on-one meeting with your Sidekick will go a long way toward starting on the right path. Both of you should leave the meeting understanding the roles, responsibilities, and expectations.

Introduce your Sidekick to the team.
We have found that the agents who succeed the most with this service are the ones who take a moment to introduce the Sidekick and ARS rep to the rest of the team. This introduction accomplishes several key things:

- The team knows they exist
- The team knows there is a combo team of remote service teammates who will interact with them
- It provides a chance for your in-office team to get to know the Sidekick and ask them questions
- It allows your team to clarify any communication items and expectations.
- Getting team buy-in is critical. Use this chance to introduce your Sidekick and get buy-in from your team!

Schedule monthly check-ins
This service is designed to be hands-off after these introduction calls. However, your Sidekick is still a new employee, so having a quick monthly check-in truly helps keep expectations aligned with your goals and vision. We recommend scheduling a short, recurring monthly call with your Sidekick to see how things are going. This keeps the relationship fresh and personal.
Encourage your Sidekick to suggest improvements or new ideas.
During the monthly check-in, take the opportunity to gather feedback from your Sidekick. They will see many client files and have numerous client interactions throughout the month. They may see trends that you may not see. Find out what is working, what is not, and what might be improved.

At Sidekicks, we love holding monthly retrospectives with our entire team to systematically review how the month went and what we can improve. How was the month, and what can we improve? Doing so has created a culture of transparency and continuous improvement, and everyone is involved, not just the team leads and managers. It is the most important full team meeting we hold each month; it is that powerful.

Every business owner wants to start on the right foot with their new employees and vendors, and the first 30 days are the most important. We recommend following this outline above to hit the ground running with your Sidekick.

Part 3: Setting a Cadence, Continuous Improvement and Beyond

Nothing in my experience can improve a business faster than building trust and accountability. Combine trust and accountability with great culture, and you create an unstoppable business. In this section, we cover exactly what it takes to build trust and accountability with remote employees. In addition, we will discuss the game-changing art of Retrospectives and Continuous Improvement; two techniques used to transform your team and production. The great news - this is all possible with remote employees and teams!

Chapter 6: Trust & Accountability with remote team members

Trust, but verify.

These words shaped my early career in the Army as a Combat Engineer and Tank Commander prior to our deployment to Iraq. Trust your team. Verify the results.

In a nutshell: Empower your team. Trust them to do the job. Take ownership by checking that things got done on time and to standard. Push the decision-making down as far as possible. Empower your team. Trust them and give them everything they need to succeed as servant leaders.

This does not mean, however, that you can disappear! Quite the opposite. Your job as the leader/business owner then becomes to empower AND verify, creating an environment of accountability.

We were taught, as leaders, to take full ownership of our teams. Serve and project your platoon. Lead them and when things went off the rails, take responsibility for everything. If not careful, this can be a quick path to micromanagement. To combat that outcome, we created an environment of trust, empowerment, and teaching. Give them a chance to screw up. Give them a chance to make decisions without major repercussions. Then, use every scenario as a learning point. You ARE responsible for the outcomes, yes. However, you are also responsible for developing leaders on your team and building trust so they know that you have their back.

Trust, but verify.

How can we apply this to our businesses?

Application:

What is your team culture like? Is it built on trust and empowerment, or fear and results above all else?

My heartfelt advice is to push your team into an environment defined by trust and accountability. Please note, this takes time. It does not happen immediately, and it may take much longer than you think, but it is worth it. Your goal is to create an environment in which you can trust but verify.

What does that mean?

It starts with you as the leader. Your charge is that of evolving into a servant leader. By this, I mean you must put the needs of your teammates above your own. You must lead by example, with a strong but listening heart. Leading by depending on fear and aggression will not work. Above all, you are fully responsible for your team and their actions.

Second, you should create clear goals and expectations. Once done, ask yourself these key questions:

- Does the individual have the skills necessary to meet those expectations? If not, train them.
- Does the individual understand the goals clearly? If not, review them again and have them explain the goals back to you. Do not proceed to the next step until everyone clearly understands the goals and expectations.
- Have you empowered the individual to be successful? Have you provided the environment, team, skills, and tools necessary for them to get the job done? If not, do so.

Third, you should begin a campaign of radical transparency. Of course there are business items that should not be shared with the whole group—HR issues, some financials, and so on—but everything else should be readily available and clear for everyone. As the leader, it is your responsibility to set the standard of transparency in this way, and the team will follow. Be transparent with goals, how things are moving, the wins, and, yes, your mistakes.

Be completely transparent. In our company, we share all of our metrics, even including our gross and net revenue. Why? Because our people can do the math and we want them to take ownership of the company's success. Being transparent with the money and how we are allocating it means there will be no room for whispers, rumors, or backhanded comments. Everyone knows, and so I can keep everyone accountable for it. They are part of the team's success for that revenue. We are also radically transparent with our wins and losses. If something goes wrong, we address it immediately and objectively so the team can learn how to solve the issue and avoid it being repeated. No finger-pointing. No avoiding. Building a culture where the team is responsible for wins and losses means that if something goes wrong or someone makes a mistake, the team takes ownership for fixing it.

This requires tremendous trust, but that comes from the steps outlined above. When you provide clear leadership, lead by example, create a transparent environment, and empower your employees to do their jobs, you obtain trust.

Trust is everything.

All too often, I have seen organizations crumble because trust due to lack of trust. It might look like a leader not backing their employees or undercutting their decisions or perhaps that leader was not transparent and did not have the courage to address the problems directly. Build an environment of trust instead. It takes time, but when you do, you will see your business explode like never before, and your clients will be taken care of better as a result. Make no mistake; as much trust as you build, it is still your responsibility to verify it. The buck stops with you, and you are ultimately responsible for your business.

Do the right thing. Empower your people. Trust them to get it done. Then verify it got done. Trust, but verify.

Key Takeaways:

- Empower, with oversight: Embrace a leadership style that empowers team members, while implementing a structured approach to verify their work.
- Communicate clearly: Establish and communicate clear goals and expectations, ensuring team members fully understand their corresponding responsibilities.
- Practice radical transparency: Foster an open environment where wins, losses, and business metrics are shared openly, building trust and collective accountability.
- Consistently verify: While trust is foundational, regular check-ins and verifications are crucial to ensure that tasks are completed to standard.
- Cultivate trust: Invest time in developing a trust-based culture, recognizing that this is the bedrock of a high-performing remote team.

Reflection:

- Consider the current level of trust and accountability within your team. How can you apply the principles of servant leadership, clear goal-setting, and radical transparency to enhance that trust?
- Reflect on your verification processes – are they constructive and aligned with empowering your team members?

Chapter 7: Feedback and Performance Reviews for Remote Employees

Performance reviews and expectations can be difficult, time-consuming, and effort intensive. You may have uncomfortable conversations, but the benefits far outweigh the challenges. The good news is that your performance plan can be simple. In fact, it must be simple for your team to understand.

Teams go off the rails when expectations are unclear. This is our starting point before setting goals and reviews. I recommend sitting down with your remote employees and clearly stating what your expectations are. Then have them repeat it back to make sure they understood! This one exercise, what I call a “brief-back,” can save so many headaches down the road.

When onboarding your new remote employee, schedule a 1-on-1 video chat with them to review the expectations and the associated performance plan. Let them ask questions to clarify, and then both of you can sign the document to commit to that year’s plan.

What does this do?

First, it keeps you both accountable. Second, you have something to refer to when everyone forgets what they said 12 months later.

Make it clear. Make it concise. Document, document, document.

Application:
Let us put this into context with remote employees, because setting performance standards and conducting periodic reviews is even more critical when your employee is working remotely.

Why?

There is less chance for you to provide quick feedback on the fly, and it is entirely normal to go weeks without giving feedback. We get busy. The phenomenon of out of sight, out of mind starts to occur. Setting appointments with your remote employees is the way to combat this.

Spend 20 minutes planning the next quarter. Get into a rhythm with it, so the meetings become a habit. In my experience, this schedule works well:

- Schedule a bi-weekly check-in with the employee
    - An informal call for the two of you to talk, discuss how things are going, ask about their personal lives, and elicit feedback.
- Schedule a quarterly progress review
    - This is semi-formal. You review their progress with them on the video chat, measuring it against the performance plan you both agreed to. The outcomes are

1) notes on progress and 2) an action plan to help them stay on track, improve to get back on track, or create additional stretch goals if they are crushing it.

- Schedule an annual review
    - This one is formal. Review their results against the performance plan. Discuss what went well, what needs improvement, and what you can fix immediately following the meeting. Use this meeting as the benchmark for bonuses, tying together the performance results with the incentive plan that you have for your employees.

Close out with both of you adding these actions and signing the document, acknowledging the results and the meeting itself. Give them a copy and keep it in your HR records. This might sound like posturing on your part, but having a record is so much more beneficial for the employee. It gives both of you something concrete and objective to refer to when raises and bonuses come around. It also helps you both remember what you agreed to do. Remember, we tend to forget our agreements after 12 months!

Done consistently, these meetings will keep you in sync with your remote employee and, as a bonus, ensure expectations and progress towards meeting them are kept up to date along the way.

To recap the meetings needed:

- Bi-weekly informal chat
- Quarterly semi-formal progress review
- Annual formal review

The Power of Documentation:
Do you document meetings and agreements with your employees? It is easy to dismiss doing this as busy work. There are a million other things that we need to take care of each day, and creating meeting minutes is not one that I ever really feel like doing. However, I have realized that my brain will not remember the conversations I had a month ago, and there is no need for it if I document things.

When you finish your calls and progress reviews, stay with that same train of thought and spend 5-10 minutes capturing everything you discussed and agreed to. Then, immediately send it to your remote employee to check for errors or omissions. This way, you can verify what you spoke about, the decisions you reached, etc. You will also get buy-in from your remote employees on the spot. This is handy for both of you when conducting a progress review and trying to remember what you agreed to.

He who documents wins!

In an upcoming chapter, I will show you exactly how to do this and which tools I recommend you use to ensure all your excellent documentation doesn't get lost, because nothing is more frustrating than spending time on notes and then losing them!

Key Takeaways:

- Implement structured performance reviews: When regularly conducted (bi-weekly check-ins, quarterly, and annual formal reviews) then can provide consistent feedback and track progress.
- Create transparent incentive plans: Ensuring they are fair and directly linked to clear, measurable performance metrics.
- Recognize the importance of clear expectations: Set clear, measurable goals that align with these expectations and ensure mutual understanding through thorough communication.
- Regularly document: Consistently documenting the content of feedback sessions and performance reviews ensures clarity and provides a reference point for future discussions.
- Empower through feedback: Use feedback sessions for assessment and as opportunities to empower and guide remote employees, fostering professional growth and alignment with company objectives.

Reflection:

- Consider how your current performance review and feedback processes are structured. Do they provide clarity, fairness, and actionable insights?
- Reflect on how implementing regular, documented feedback sessions could enhance your team’s performance and motivation.

Chapter 8: Resolving Conflicts with Remote Employees

Inevitably, there will be conflict with your remote team. Whether individual drama, team drama, underperformance, or attitude problems… even with great employees, it happens. So, what do you do about it?

Jocko Wilnick wrote an incredible book called "Extreme Ownership," which outlines the steps for leaders to take based on his experience as a Navy SEAL commander in Iraq. First and foremost, Jocko details what he calls “extreme ownership of the leader,” which means that you, as the leader, should shoulder full responsibility for any team issues, behavioral issues, training issues, or lack of performance from teammates. It is not their fault. It's yours. Before blaming anyone else, look inward. What should you have done better? Yes, this is easier said than done, but he is absolutely correct.

Take a good, hard, unflinching look in the mirror and ask yourself what part you may have played in the ongoing issue. Did you not train the team properly? Did you not provide clear guidance? Did you not spend enough time building the culture or mentoring the teammates? Did you get so busy that you neglected to take the time to reach out? Did you hear of an issue earlier, but do nothing about it?

These are tough questions. But the premise is spot on - you are the leader, so you should take responsibility first. Resolving conflicts with remote team members is no different from resolving conflicts with in-office personnel. When considering conflicts, spend some time discovering their root cause by pondering these questions:

- Is there a conflict between team members?
- Is the person not performing as expected?
- Is the person not available, or do they seem to be frequently missing in action?
- Is the person having trouble communicating with customers?

Personal conflict is a part of life. We like to think we can make perfect work environments where everyone gets along. We also like to think we are good drivers. Why? Because people are people, and everyone has an ego. Unchecked egos and a lack of empathy are at the root of most conflicts - not listening to the other person, getting defensive, being offended, feeling like the other person always disagrees with you, the fact that they like the Packers, and you like the Rams… maybe you love blue, and they hate blue. Perhaps you are too optimistic. There’s an endless list of reasons why people are just people. So, conflict is inevitable.

The good news is that, like any skill, you can work on preventing and resolving conflict daily. And you can do it without losing your mind.

Application:
Resolving Conflict - Top-Level Approach
First, we need to build the right habits, over time, to handle conflict. These five simple steps are all it takes to objectively resolve team/employee conflicts:

- Identify the issue: What is going on? What is the root cause of the issue? Don't focus on the now. Look for the how. How did we get here? What events unfolded to bring us to this point?
- Meet with the person or team and LISTEN: Just listen. Most people just want to be heard, so listen before you speak.
- Gather the facts: So you can be objective and fair.
- Resolve the issue, directly but kindly: Provide guidance and direction on what you expect from everyone moving forward. State the consequences. Above all, be kind and extremely clear. Ask them to brief-back your expectations.
- Monitor the issue: Is it resolved? Is it festering? Repeat the sequence if the issue remains.

Finding the Root Cause
There are many documented ways engineers ferret out the root cause of issues. You may have heard of the fishbone diagram, or the Root Cause Analysis (RCA), but for conflict, we simplify things. It all starts with a simple question - why?

Have you heard of the five whys? If you are a parent, you might use this often, without realizing it.

"Why did you punch your brother?"
"Because he made me mad."
"Why did he make you mad?"
"Because he took my toy."
"Why did he take your toy?"
"Because he is mean!"
"Why do you think he is mean?"
"Because I took his toy!"
"Why did you take his toy?"
"Because you gave me a blue one, and he has the green one!"

As parents, we tend to rush to fix the effect or symptom—the punching—when we should be more focused on addressing the underlying issue. The root cause of the brothers' scuffle needs to be addressed to prevent this behavior cropping up again in future by teaching them how to share and be appreciative of their things.

But I am going to strongly suggest you fire employees who punch their colleagues. Things are not that straightforward most of the time, though. People are complex, and so are their issues.

When handling a personality conflict or an inter-team issue, I encourage you to take a step back and find the root cause of the issue. You will see the effects and the symptoms.

“Judy did not do her job, and now the report is late!”

Yes, the report is late. Yes, this is an issue, but why did it actually happen? Did Judy not do her job, or is something else at play? Did we not teach her properly? What support did she not receive? Did someone else forget to do their part?

Take a step back, analyze the issue, and start asking the five whys.

What About the Top Performer Who Is Also a Jerk?

You have probably met this person sometime during your working life. He is a high performer and makes tons of sales, perhaps even the most out of anyone. He crushes his goals… as well as anyone in his path. Unfortunately, that person is also a class-A jerk. He may be arrogant, talk down to people, tear down others, is not a team player, and yet still absolutely kill it at his job.

What do we do??

Get rid of him.

“But he is our top performer! Our business will suffer if we let him go!”

This is a tough one. I recommend taking a step back to see what the business is NOT doing because of this lone wolf. Is the team underperforming because they feel belittled. Is the team camaraderie down? Is your culture starting to slip? It is shockingly painful to see what a toxic high performer can do negatively to a team.

Keeping the person has its consequences. A leader lets bad behavior slide because he is making the sales. People take notice and realize that you are valuing the bottom line over the cohesion of the team.

And then it happens. Your culture starts to slip. People become frustrated and apathetic. They, too, begin behaving the same way. Their leader has shown that all he cares about is those sales numbers, so why bother being a good guy? The team starts bickering and stabbing each other in the back, all because their leader did not squash the toxic high performer. I have seen this so many times in my career, and it happens because of leadership being fearful that the business or project will not thrive without that top performer. They may even fear that their bosses will get mad or fire them if they let the high performer go.

Sounds extreme? Unfortunately, not. I have seen this occur time after time in various industries and the result is always the same. Uninterested employees. Lack of cohesion and teamwork. Internal bitterness and backbiting. Lower sales.

Thankfully, the opposite happens when you let go of the toxic employee. You may feel a short term hit when the person and his sales are gone, but something magical happens. The team knows that you have their back. They feel secure that you put people and culture above all else.

The result? The team rallies and starts helping each other out. Knowledge is shared, customer service improves, and sales go up. Giving people purpose, support, and a team spirit can make miracles happen.

Many years ago, I faced this very scenario. There was a brilliant, top-performing teammate who, in my opinion, was a genius. We all felt a bit stupid around the guy. He was an absolute master of his craft and designed incredible solutions. He was also a Top Tier Jerk. He belittled the team, made enemies of groups we should have been partners with, and expected perfection in an environment in which it was impossible. He was awful, and we hated working with him. It was like walking on eggshells around the guy. One wrong move, and you would be on the receiving end of a verbal assault.

We tried talking with him. We tried coaching him. Frankly, we tried everything. One day, my tech and I devised a plan to get this character on the road to present his crazy good ideas all over the country. So, off he went, for months on end. This allowed the team and me to actually run the program. Morale improved. The team, no longer feeling threatened, started developing great ideas on their own. The team excelled so much that we started crushing it for our clients. Removing that one brilliant but toxic person opened everyone's eyes to the reality that things would still get done well without him. A group of normal performers became a high-performing team. The world did not end.

Conflict cannot be prevented, even within high-performing teams, but we can prevent it from festering. When there is an issue, resolve it immediately. Moreover, build your team culture with empowerment and trust at its core so the team can self-resolve most issues. When it comes to remote employees, issues fester more quickly because they are out of sight, out of mind. Do not let that happen. Treat issues with remote employees with care and urgency.

Key Takeaways:

- Exercise extreme ownership in conflict resolution: Adopt a mindset of extreme ownership, recognizing that as a leader, the first step in resolving conflicts is to look inward and assess your part in the situation.
- Identify root causes: Use strategies like the "5 Whys" to dig deep into underlying causes of conflicts, moving beyond symptoms to address core issues.
- Take a structured approach to conflict resolution: Including identifying the issue, listening actively, gathering facts objectively, resolving the issue with clarity and kindness, and monitoring the situation for ongoing resolution.
- Address top performer toxicity: Recognize the impact of toxic behavior, even from high performers, and address it decisively to protect and enhance team culture and overall performance.

- Regularly document communication: Maintain regular, structured communication with remote team members, ensuring that feedback, progress, and conflicts are addressed promptly and documented for clarity and future reference.

Reflection:

- Consider your current approach to conflict resolution within your team.
  How can the strategies and principles discussed in this chapter improve your ability to address conflicts constructively and foster a healthier, more productive team environment?

Chapter 9: The Retrospective: Creating a culture of Continuous Improvement

Continuous improvement is a tremendously impactful idea for any business. Put into practice, and you may find that your business and team will grow faster than ever before. The idea of improving your business is not new. Nearly every business owner wants to make things better, to some extent. However, adding Continuous Improvement as a core tenant and a structured system is more outside of the box.

The term is regularly used in the software world under something called agile. In this structure, software teams regularly and systematically meet to discuss how things progressed, what they are working on, and the challenges they are facing. The idea is that if you do this on a consistent schedule with a drive for relentless transparency and improvement, you will constantly identify and improve your system or software.

The same principle applies to our business. At Sidekicks, we have implemented a game-changing atmosphere of relentless improvement. By this, I mean, we are always looking to improve our entire business from our website, to onboarding, to customer interactions, to employee satisfaction, to communication systems. All of it!!

However, this becomes very chaotic if there is not a proper system in place. So, we implemented two critical components:

- A monthly full-team retrospective
- A tracking system to capture, track, and monitor the ideas we want to implement

Retrospective:
What is a retrospective? If you are unfamiliar with this term, it is synonymous with "after action review" and "hotwash." Essentially, this is a specific meeting where the entire team discusses the previous cycle (week, month, quarter, etc) and covers:

- What went well?
- What did not go well?
- What can we immediately improve in the next cycle?

Of all the meetings that we have, this is the most important and most impactful meeting. Attendance is mandatory and we take it very seriously. Here is what the meeting really accomplishes:

- You give your entire team a voice
- You create an atmosphere of transparency and trust
- You get to hear wins, concerns, and ideas from team members you may not interact with often
- You give the entire team a chance to hear/see the big picture
- You give the entire team a chance to think of solutions outside of their responsibilities

At Sidekicks, we hold this meeting every month with the whole team, and the results have been extraordinary. We are able to capture, each month, what we did well, what did not go well, and what we want to improve the following month. This content is captured in our project management system, which is available to the whole team in real-time, allowing us to review our lessons learned whenever needed.

Furthermore, this single meeting has been the cornerstone to building an incredible culture of trust between all team members and leadership. Nothing is off-limits in the retrospective, and we unpack everything that we need to work on, regardless if it is the front line worker or the CEO.

The result is the ability to rapidly improve our products and services, systematically each month.

Application:

I recommend scheduling your first retrospective the first week of next month with your entire team. The meeting takes about an hour to an hour and a half, but it is worth the investment.

Retrospective steps:

- Send an email to the team explaining the retrospective and why you want to do it. Outline the expeditions that everyone should come prepared to discuss the three questions: What went well? What did not go well? What should we immediately improve next month?
- Schedule the retrospective with video calls (MS Teams for example). Ensure everyone gets on camera, as having the face-to-face interaction and seeing body language is critical.
- Hold the retrospective. Identify someone to take notes to capture the thoughts, comments, and action items throughout the meeting.
- During the meeting, go to each person asking them-- What went well and what did not go well? To make this more streamlined, ask them to give you three things for each.
- After everyone has spoken, ask the team collectively what the most important things to fix next month. You get buy-in and consensus quickly this way.
- Give everyone a high five and then get back to work!

Conclusion

Running a business is not for the faint of heart! Integral to our business is helping our clients reclaim their balance. That means caring deeply for others and their families. By the grace of God, we have found a way to provide value to others via our services. The culmination of over a decade in business with Agency Resource Solutions—our sister company—we know how to train, mentor, and lead remote employees.

There is massive potential in expanding your hiring aperture to include remote team members. There are pros and cons for every scenario, and we know remote team members can achieve the best of both worlds for you and them alike. They get flexibility and opportunity, and you get a larger pool of great candidates to choose from, potentially from different time zones, which can increase your business presence.

As we move steadily into this decade, now more than ever, change is the only certainty, and we should embrace it. Adding method to manage the madness will help things seem less overwhelming. Remote work is here to stay, and I believe it will only continue to grow as technology breaks even more barriers. Think of how easy it is to have a video call with someone now, compared to those grainy Skype calls just ten years ago. Now, everyone has video calls at work, even when they are in the office!

Hopefully you have found this book helpful in structuring your leadership and management to make the very best of remote employees. All that is left is to take the extra step - be the leader who is seen, who leads by example, does the right thing, and treats others as they would like to be treated. Everything else will fall into place.