

# How to Have More Time Each Day:

## How to Find, Screen and Hire Assistants and Virtual Assistants



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## Hiring Assistants

You write out a description of what you want:

**Expanding financial planning firm needs service assistant with 2 years experience in an investment or insurance sales environment. You need to know how to read investment and insurance statements and handle incoming client service inquiries. Must have pleasant phone manner and good phone voice to set client appointments. Must be super-organized. Must have very good knowledge of MS Office and facility working with PCs (you will take a short quiz).**

**Please email resume with salary history to you@yourbusiness.com**

Place this advertisement in your main daily newspaper, in Craigslist at [www.craigslist.com](http://www.craigslist.com) (if it operates in your area) or other local on-line job board.

If the assistant will be doing a lot of phone work, don't ask them to send a resume. Rather, in the advertisement say "call this number." The number is a voice mail line and here's the message you record:

"Thank you for calling about the assistant position at our firm. It's a great atmosphere with great benefits. At the tone, please leave the following information:

1. What work you are doing now
2. Why you are making a change
3. Any personal goals you want to accomplish in the next 3 years

Then, please email your resume to you@yourbusiness.com."

By having your prospects call a voice mail, you get to hear how they sound on the phone and call back only those with good phone presence. You'll be shocked at how

many people call and hang up when they are asked to speak spontaneously. And this saves you a ton of time because you spend time interviewing 3 people instead of 12.

Next, you call firms where this person may already work.

For example, if you are an insurance professional, you call each of the large insurance companies that have offices in your area. When the receptionist answers you say “Hi, who is this? Are you the regular receptionist there? Great. I am an independent insurance agent and I am looking to hire a top-notch assistant and pay them well. Is there anyone in your office that has been thinking of leaving?”

If they say “no” or “I don’t know”, you then say, “Great. Does the issue of changing jobs ever come up among the people who are supporting the agents there? Would you take my name and number and if someone mentions they are looking, would you pass it along to them?” If you are in the securities business, you call the large securities firms and ask the same question.

There are plenty of people at large firms unhappy with the advancement potential or the bureaucracy or working for 4 professionals pulling them in different directions. They would love to have one boss in a small firm where they get respect and a decent salary.

Let’s make a distinction between a service assistant and sales assistant. A **service** assistant is someone that is super organized and could be an accountant.

These people perform the following activities:

- Answer the phone and handle 90% of the calls completely
- Send literature
- Do most client retention activities—birthday cards, holiday gifts, etc.
- Open mail
- Schedule appointments
- Handle client service issues and “follow-up”
- Handle the flow of paper

These people are more introverted (see personality profile below).

Hire a **sales** assistant to:

- Call suspects
  - Set up seminars
  - Cultivate host-beneficiary relationships (more on this later)
  - Conduct a “find the money” campaign with existing clients
  - Run your referral system
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Sales assistants are “people” persons. They are extroverted, handle themselves well with people and would not do well in a service assistant’s position requiring detail orientation. For this reason, you NEVER attempt to have one person do both jobs, as no one person will be effective at both.

### **Rent, Then Hire**

Call the temp agencies in your town. Tell them what you are seeking. They can often get someone for you under the following arrangement:

1. You will pay \$25 an hour for this person. If you want to hire them full time within 90 days, you pay the temp agency \$3,000 and that person is yours.
2. If you rent this person for the entire 90 days, you can often hire them with no payment to the temp firm

This arrangement might be great for you because they have already screened people; you can check someone out for a week or two and get rid of them if they are not great or hire them if they are great.

## Screening

You screen people in the following ways:

1. The appendix includes a PC literacy test. You have the person do this as you watch (you will need to alter this to match the file names and drive assignments on your network)
2. You have them take the personality profile in *Please Understand Me* by Keirsey and Bates. If you are hiring a sales assistant (someone that needs to be more extroverted, likes talking with people, etc) and the personality profile says they would make a good accountant, then you know you have a bad match (but this person might make a great service assistant). See the appendix for more details on the profiles you seek.
3. I personally also like to give an IQ test because I want smart people working with me. Go to [www.queendom.com](http://www.queendom.com) and have them take the classical IQ test. You want scores above 120.
4. In addition to the above, I highly advise you do two other things to screen out a lot of bad candidates. Give them the math test in the appendix. If they don't get nine of those right and can't do that by hand then they're certainly not going to be your service assistant; they're not the person you want in that job. You'd be shocked at how many people don't get more than five out of ten correct. These would be things that any third grader should be able to do and you'll be shocked, unfortunately. In addition, I would give them a little writing test. Just ask them to write two paragraphs about what they did on their summer vacation or why they went to the college they went to or whatever. Just have them write something for a couple of paragraphs so that you can read it and again, unfortunately, you'll be surprised how illiterate many Americans are but that, in any case, will make sure

you're picking somebody who can do simple math, who can write and who has the right personality fit. If you do those three things, it will help screen in the people who can really do some good business for you to help you run your practice.

5. Interview for talent, not experience. For example, if you want someone that thinks on their feet, then ask "what would you do if..." and see how they think. It's much more important to hire someone with the right talents (things that cannot be learned) than the right experience (things that smart people can learn quickly).

You must train your assistant and should devote several hours to that the first couple of weeks. Then ½ hour per day thereafter until they do their job better than you ever could. As you train them, you must document and build the assistant's procedure manual so that all processes are documented.

Get them licensed. They will not only better understand what it is that you do, they can help you generate revenue and not bother you with small issues (a securities transaction or completing an insurance application).

## **Outsource Your Assistant**

Instead of employees, you may want to outsource the support you need. Visit [www.msvas.com](http://www.msvas.com) or [www.totaloffice.cc](http://www.totaloffice.cc) . These sites allow you to find independent contractors that work on their own so you don't need to manage employees. Many work for other financial advisors so they know and understand the business. If you need occasional work done, you can get projects done by listing your project at [elance.com](http://elance.com) or [guru.com](http://guru.com).

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