

## Getting Out of Your Day to Day

Hey everyone out there in Bookkeeper Lab Land. This is Justin Boynton bringing you some core content around getting out of your day to day. Now what do I mean by that? Well, the way I took it is removing yourself from the business, from the everyday mundane tasks of working in your business, and getting out so that you can work on your business. The only way we're going to really grow into scale, which I know if you're a part of this program you want to do, the only way to do that is to really get out of the day to day. Hopefully this content here, hopefully you enjoy it, hopefully you get something out of it. But what I'm going to do is cover a few steps to help you do that, to do that exact thing, to start to work with someone so that you can off-board certain tasks, and that'll allow you the time to do, quote, unquote, more important things.

But first what I want to do is figure out what does it mean getting out of the day to day. What does it mean to you? I gave you my definition. What you want to figure out is what does it mean to you? Are you looking to outsource just a few tasks? Maybe just reconcile bank ... I don't know, but if you just want to outsource just a few tasks, are you wanting a team member to take over the day to day work so you can focus only on client meetings and analyzing financial statements and the more higher value things that clients expect from us? Or do you want someone else to handle the client entirely? There're certain clients that you probably work with that you could definitely do that, where you're just providing financial statements for, you have a bookkeeper that works with you, and they can basically handle that entire client by themselves. Really figuring out what the day to day means to you is the first step.

The next thing we want to figure out is, and this is probably the most important, is why do you want to get out of the day to day? Of course, we've heard the saying before, start with the end in mind. Really, that means spending more time on your business rather than in your business. It could mean taking some time to do the things you really love or investing more time in your family. You have to figure that out. If you don't start with the end in mind, you'll find yourself struggling with this concept. If it is growing your business, then you need to spend more time on your business, whether it be with marketing, whether it be with business development, whether it be with client relations, whatever it may be, if you cannot do the everyday tasks that frees up time for you to go do things that will help grow your business. Or maybe you just want to get rid of the everyday stuff so that you can spend more time either going to the gym, becoming a more healthy person, or traveling two or three days a week, making road trips here and there. Maybe you want to take a week off a month and go ... You could take an RV trip somewhere.

The point is, the point I'm trying to make here is you really have to figure out why you want to get out of the day to day. The key here is to determine your vision and to have it clearly laid out, and it will make this process worth it for you in the end.

Moving on here, next step is to determine how good are your processes documented. How good are they? Everything hinges on that. If you have good documented processes now, you will have a much easier time having someone else do the work. If your processes are good but

they aren't documented, it'll take you a little longer to get your team members helping you out with specific tasks. But it's a heck of a good start. If you have good processes and you don't have them documented, get them documented. Use a screen capture software. Spend some time really figuring out processes. This core content is not around processes, so I'm not going to harp on that, but I think we all understand the importance of having good processes.

Then the last one is if you have mediocre processes without documentation, you have some work to do. But it's okay because if you have a big enough why, you can certainly make it happen. Processes are super important to be able to off-board certain tasks.

Now that your processes are sound, now what? You like how I made that quick jump there? In the matter of five seconds, all your processes are sound. No, just kidding. But I'm just giving you the steps here that will help you get out of the day to day. Here's what you do next. You figure out what you want to outsource by doing what's called a task audit. Now, if you've heard any of Ben's videos before or on the I Love Bookkeeping podcast, he's talked about doing a task audit. Take a week, two weeks, a month, two months, whatever it may be, and list out every single task that you do. It's probably going to be a pretty big project, but it will allow you to get everything out and it helps you determine what kind of tasks you want to get rid of. That could mean things like email, it can mean things like reconciliations, could mean marketing, could be documenting your processes, could be putting stamps on envelopes, who knows? It could be really any one of these. You really want to figure out what exactly you're doing so that you know what exactly you can have someone else help you with. It makes total sense.

All right, so continuing on, we take that list of tasks that we have and mark each task as three different ways. One is competent. What competent means is you can do it well, but it doesn't exactly fire you up. You don't get all that excited about it, but you can do it well. I know for me, I guess I'm a little weird. Like reconciliations, yeah, they're okay. It's nice to see the triple zeros. But if I could have someone else do it for me, I think that's great. I know a lot of bookkeepers love to see the triple zeros and it is very satisfying, but you know what I mean. Being competent is you can do it well, but you don't get fired up about it.

You can also mark a task as excellent. Are you excellent at doing this task you? That means you can do it well and it does get your motor running a little bit. You start to get a little bit excited about it.

Then third one is your unique ability. Is this a unique ability? That means is it a task that you can do well, and you're excited about, and are items that only you can do? Talking with Ben, every now and then, he says that marketing is one of the most important parts of our businesses and it should be one of those things that only we can do. You can have someone schedule social media posts or whatever. But actually, coming up with the content is an important task and a unique ability that only you can do.

The next portion of that is you want to assign a dollar amount to that task to help you see your value. If you have something like reconciliations, or categorizations, or something like that, you can assign a dollar amount to it. Let's say it's 15 or \$20 an hour work. But then you get up to

marketing and processes, you're getting up to maybe a hundred dollars an hour work. Put a dollar value. It doesn't really matter what it is, but put a dollar value to help you see your value in this task.

Now I want to take a little tangent here. I heard a great talk one time on urgent versus important, and it's so important to differentiate the difference between the two. The speaker was Stephen Covey, and everyone knows he's the author of *Seven Habits of Highly Effective People*. He was giving this talk one time and he was talking about urgent versus important. He asked the audience, "Hey, who thinks reading is important?" Of course, everyone's hand in the room went up. Then he later asked, "Well, if reading is so important, who is currently reading a book?" About a third of the hands went up. Then he asked the audience, "Well, why is that? All of you agreed that reading is important but why are you not doing it?" After an uncomfortable silence, because he was looking for someone to come up with an answer, after an uncomfortable silence, one guy in the audience said, "Because books don't ring." I thought that was interesting because a cellphone rings, your email dings, your something else blings, or whatever. There're all these things that are vowing for our attention, but a book or content that you're reading is an important thing, but it is not necessarily urgent.

You want to think about that with your tasks as well. Is it an urgent thing that gets done or is it an important thing that gets done? An urgent thing might be categorizing at the end of the month or reconciling at the end of the month. But an important thing is to get your next piece of marketing out there. I just wanted to do a little tangent there because I think it's important to differentiate between the two. Okay?

How to really get started here. We have a list of tasks to get done. Now what? We look at tasks. What you want to do is look at tasks labeled as competent. What are they? You go through that task list and go through all the ones that you're competent at. Most likely they're things that I've been mentioning. Reconciling, categorizing, dealing with email, scheduling, receipt management. This is what we call the low hanging fruit that you want to start with.

Then once you get those tasks listed out, really try to figure out what role you want to hire for. Who's going to help you with the work? On the *I Love Bookkeeping* podcast, almost every single one that I've heard, Ben talks about a virtual assistant may be the way to go at first. Maybe you hire a virtual assistant that can do certain administrative tasks, that also might have some bookkeeping experience. Who knows? There're many resources to help find a VA that can help you. BELAY is one of them, Zirtual, Upwork, there's all kinds of different ones. You can also go on a Facebook group. There's a lot of virtual assistant Facebook groups that you can go on there and ask questions. You can go on there and look for certain types of people that have certain experience. A bonus would be a VA with bookkeeping experience. You may request the VA service to look for a VA with bookkeeping experience. Then of course there's the Bookkeeping Professionals, another great option. Bookkeeper Launch has an awesome Facebook group, and is a great resource for people who may not want to grow a business, but still want to be a part of someone else's business, and help them do every day bookkeeping tasks. You also may find someone locally.

One thing that I've learned from past mentors' is don't necessarily just hire them for their experience. Give them some sort of test that shows you how they would interact with a client or just something like that. Don't just hire them for their experience because they have 20 years being a bookkeeper. You want a well-rounded person because it's much easier to train someone on bookkeeping than it is to help them have a good attitude and learn how to respond well to client inquiries. I hope you're picking up what I'm putting down there.

Let's see. Where are we at, at this point? By now we have determined what it means to get out of the day to day. You've defined that for yourself. You've also figured out reasons why you want to do it and you've written it down. In the vision lesson that we have in Bookkeeper Lab, we go through and we help people document. That's part of the deal with vision is actually writing it down. When you write it down, it becomes real. When you put pen to paper, it's real. So, figuring out those reasons why you want to get out of the day to day. Then properly record your processes. Of course, this is so, so important. Number three is properly record your processes. Number four is listed out what work do you want to outsource. That's that task audit that we talked about. That's figuring out that low hanging fruit, the tasks that might be urgent versus more important, so a lot of that low hanging fruit that you can have someone help you with. Then determine what role you want to hire for. Maybe it is a VA. Maybe it's a VA with bookkeeping experience. Maybe it's just a trained bookkeeper. That's where we are at this point.

Next, so you've got a team member now. You go through and hire. By the way, there's a lot more to this process of hiring, but we're going to cover that in another lesson. But right now, at this point, let's consider yourself that you've hired someone to do some work for you. Now both of you, it's time to get to work, right?

Number one, training is so important. I would highly recommend recording the training sessions for their reference later. I just did this the other day with one of my team members, is I went through and went through a documented process and captured it on video, when both of us were talking, when both of us were going back and forth, so we asked questions of each other and we defined what we wanted to do. That recording of that training session is now in a folder that we can go reference at any time. If they have questions later, they can certainly come to me, but they have a resource now. They can go in that video and go back and listen to it and re-learn exactly what we covered. Training is so important. Of course, be open for questions. Always provide great resources so that your team members can do their job really, really well. Remember that they're helping you with a task at first. They're not helping you with a client, they're helping you with a task. That's the reason why we do the task audit is that we figure out which task is that they are going to help us out with first.

We do that for two reasons. Number one is it gets the task off your plate. Pretty obvious, right? But number two, it gives a good litmus test for your new team member for future tasks. It's a way to not necessarily test them, but it gives you an idea of what their capacity is or what their kind of work is like, how they interact with a client, maybe just how thorough they are with a specific task. It's a really good litmus test on that first task that you give them.

Then we want to go back and review the work with the contractor to ensure quality, to make sure that your expectation met their expectation, meets the clients' expectations. Okay? Then based on their performance, are they ready for another task? At that point, you give them another task. You do the same thing. You go through it with them, you train them on it, you review their work, and then you determine if they're ready for another task. Then of course, you repeat the process. Now that we've gone through that, you now have a process for getting out of the day to day. Pretty cool, right?

All right. Let's see. We're going into the recap here. Here's the formula. We went over a lot of this already, but number one is define what getting out of the day to day really means to you. Determine why that's important and what it allows you to do with your time. Document your processes. What are you going to outsource? That's the task audit. Figuring out what role you want to hire for, and then simply start with one task, evaluate the work, and repeat with other tasks.

Today I want to end with you got to start with why, you're going to end with why. We say this in a lot of our videos that the vision is so important. The why is so important. Start with the end in mind. If the dream is big, the facts don't count. Whatever saying you want to come in here with, the why is so, so important because it does a few things. First, it helps the process get going. You might be sitting here like, "Oh, man. There's a lot of work to do here." But if you have a big enough why, you can say, "Okay, well, if I do get this done, I'm going to be able to spend five hours a week or 10 hours a week more with my kids." That might be a reason why. Some of you may not want to spend an extra five or 10 hours a week. Who knows?

But also it does the second thing and it helps you think strategically about what the next logical steps are. If you think about it, if you have a process and you come to a decision point in a process that you either you want to go one way or you want to go the other. Well, if you have the end reason of why you want to do what you do, it helps you know which path to take. It helps you think strategically about what those next steps would be.

All right, and number three is it helps you keep going and motivates you when you're stuck. Kind of the same thing in the first one here, but with your end the process and you find yourself like, "Oh, man. There's so much work here and I'm kind of burnt out on it," if you have that why in front of you, and you always keep that and why in front of you, it's going to help motivate you, it's going to help you get unstuck, it's going to help you move forward and get this darn thing done so that you can get out of the day to day and start to work on your business rather than in your business.

Again, I hope you found this helpful. It's a short little video today. If you have any questions, let us know. Thanks again for your time today. Bye bye.