



YOUR TEAM SUCCESS PODCAST

## Assistants For Coaches And Visionaries, with Jenna Spencer

**Shannon Waller:** Hi, Shannon Waller here, and welcome to *Team Success*. Today, I am welcoming someone with whom I have a lot of alignment, and we definitely have a shared passion for how important it is for people to have what I call strategic assistance. So, please welcome Jenna Spencer of [AssistPro](#). And Jenna, thank you so much for being here, because when we connected before, it's so clear that we really do have a shared passion for how vital this role is, especially for entrepreneurs. That's the world we can speak to. So, I really appreciate what you're doing, and I appreciate you being on the podcast. Thank you.

**Jenna Spencer:** Thank you so much, Shannon. I am so excited to talk today.

**Shannon Waller:** Awesome. All right, so we're going to talk about all things that you do. I'd love you to share some of the wisdom that you've gleaned. What works, what doesn't. It's kind of funny that, Dean Jackson says "A compelling offer is 10 times more persuasive, powerful than a convincing argument." And, I feel like I'm always trying to convince people that they need an assistant. But I think what we need to do today is present a compelling offer.

**Jenna Spencer:** Let's do it.

**Shannon Waller:** So, we'll do that. But before we jump into that, give us a little bit of background, because your origin story of how you got to where you are now is really cool. You've been a client and coach, so, I'd love to know just a little bit about where you started and how you got here, because here's a pretty cool place, but I'm sure there's some seeds from where you started.

**Jenna Spencer:** Yes. So, I actually didn't know that I was an entrepreneur, and I didn't know that I was a visionary. So, looking back on it, hindsight is 20/20, right? So, growing up, I had a very unconventional upbringing. I was homeschooled. My mother was in direct sales. My family had a family business, as well. But I thought I needed to go out into the corporate world, climb the corporate ladder. I needed PTO, and a salary, and 401(k) and all the things. But as you can imagine, it was very much round-peg-square-hole type of situation. I just never felt like I fit, really. I was always in a state of frustration.

So, what finally pushed me to leave the corporate world was my children. So, I was pregnant with my third child, and I just had this epiphany one day of driving to work, my children are somewhere else 11 hours a day. I'm dropping them off and rushing, just doing the whole rat race. And I just was not happy. I wanted a change. And so I did not start my business then. I actually started looking for a work-from-home opportunity, which this was way pre-COVID. Nobody was working from home. It was cold calling. That was what was available. And these two business coaches hired me through a Craigslist ad, and I became their assistant from home. And so, I was like, "Wow, I'm like a virtual assistant," but I was really an executive assistant, just who happened to work virtually.

So, as you can imagine, they were amazing business coaches, entrepreneurs, visionaries themselves. And six months in, they said, "Hey Jenna, in our business coaching community, everybody needs an assistant." They're like, "Where can I get a Jenna? I need a Jenna. Have you ever thought of having your own company?" And something in that little moment, the seed of visionary and entrepreneur sprouted and was like, "Hello, yes. We're here. This is our opportunity."

And so I was standing in the kitchen with my husband one night, and I had already had women from my network reaching out to me saying, "What is it that you're doing? You're with your family.



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You seem so much happier.” And I looked at him and said, “I can’t not do this. This is on my heart. I have to do this to provide for, to pass this opportunity along.” So, that was how it all got started.

And then it was so crazy because my clients eventually gave me the boot. They’re like, “Jenna, you need to go do this. It’s successful. You can’t support us anymore.” And I was like, “I don’t want to go.” But they were amazing mentors, still mentors to me to this day. And it has just been such an incredible journey. They started referring people to me right away and just focused on, “Let’s hire really great people and just do really great work.” And it’s been an incredible ride ever since. And now I’m like, “How did I ever work for someone else before?” I’m so in my visionary, I’m a totally different person now.

**Shannon Waller:** That’s fascinating. Well first of all, kudos, and the people you work for were [EOS Implementers](#), is that correct?

**Jenna Spencer:** Yes. Two Implementers. Yes.

**Shannon Waller:** That’s fantastic. I mean, I just love hearing stories where other entrepreneurs create other entrepreneurs, if that makes sense?

**Jenna Spencer:** Yes.

**Shannon Waller:** And two men supporting you is very cool, to like, “Okay, you need to go do this.” And that’s not the first time I’ve heard this. It breaks some of the stereotypes.

**Jenna Spencer:** Yes, it does.

**Shannon Waller:** Which I really like. So kudos to them if they’re listening.

**Jenna Spencer:** Yes.

**Shannon Waller:** I think that’s a very powerful thing to have done. And then of course, you were ready. You say you’re a different person. I’m sure you’re just a much bigger, expanded version of yourself. But that must have been a pretty big transition to make.

**Jenna Spencer:** It really was, because in my upbringing, I was always given creative freedom. So, in my educational experience and being surrounded by other entrepreneurs as a child, I always had all this creative expression, creative problem-solving opportunities. But I really never had professional development like mentorship. And so, when I started with these two EOS Implementers, they said, “Hey, why don’t you try reading this book? Hey, have you ever heard of this?” And all, I was like, “What is this world? Oh, my gosh!” And I ate it like candy. I was reading everything and learning. And so, they were really the first ones to invest in me with a professional development plan. And I didn’t even realize what was happening.

So, yes, it is this complete expansion, but I’ve learned that it’s constantly learning new things about myself, and trying new things, and really surrounding myself with the people that I want to be like, has made all the difference. And they’ve really fostered that environment for me. And so, it’s just been rapid amounts of growth, which has been really cool, and a little scary along the way too, but really fun most of the time.



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**Shannon Waller:** Well, I think it's part and parcel of being an entrepreneur, of being a visionary. You're doing things you've never done before. Sometimes you're doing things that no one's done before in your world, so, it is scary. There are a lot of unknowns and I pretty much, sounds like a funny statement to me, but I pretty much come down to what I think is the fact that we are differentiated by our nervous systems. Entrepreneurs have an ability to handle risks, uncertainty. They're kind of okay with that. In fact, if things get a little bit too consistent or a little bit too much the same, they get bored.

**Jenna Spencer:** Interesting.

**Shannon Waller:** And then they start to create messes. Or hopefully, if they're in [Strategic Coach](#), they just set much bigger goals and get excited by those. That prevents them from becoming arsonists, and so, they have fewer fires to put out. But it's interesting, I really do think that some people are calibrated this way or they grow themselves this way, and once they have the opportunity, they jump at it. Like you. Other people are like, "No, I would never want to do that." They're happy supporting it, but they want nothing to do with that. So anyway, kudos to you for leaping into the unknown and taking that risk. And your husband, too, because he's supported you.

**Jenna Spencer:** Yes.

**Shannon Waller:** With your family because that's pretty essential.

**Jenna Spencer:** Yeah. Oh, my gosh.

**Shannon Waller:** You got your partner there supporting you, so that's exciting. So, tell me about your business now. How does it work? Who do you serve? What's important to you in this process? Tell us more about AssistPro.

**Jenna Spencer:** Yeah, so, technically we are a virtual assistant agency, but that's a pretty broad spectrum in today's time. So, really, we are executive assistants that just happen to work from home. So, we support a lot of business coaches, a lot of EOS Implementers, and that's really where we got our start, obviously. And we support a lot of visionaries as well. So, really providing that right hand support for our clients with whatever they need. So, what's really important to us is not just a skill set and a resume, and just having someone get the work done. There's lots of different needs that clients have and so, some appreciate a team approach, some appreciate having a solo assistant. So we're really on that end of things. So we provide a dedicated assistant to our client.

And we're really big on the matching component. So, it's really a holistic match. Is there [Kolbe](#) compatibility, and what are personalities, and what's the communication style, relationship-building style? So, really looking at who's going to be the best holistic match for our clients, so, that they are getting the best support that they need. Because by supporting EOS or by supporting business coaches and visionaries, they really need a lot more than just business support. It's like work, life, self. Because for business coaches, a lot of times they're working with clients Monday through Friday, seven or eight hours at a time. And there's life going on outside of that. And so, we do provide a lot of personal support for our clients as well, so that as they're with their clients because they're giving so much to their clients and leading them, we're kind of the person that has their back. We're who's supporting them in whatever area they need, behind the scenes.



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**Shannon Waller:** That's exciting to me, because I'm pretty careful to keep those things separate. So, I have one that works with me. We were in person until we went virtual. So, almost everyone, if they did have an in-person assistant, is now virtual by nature of things. But again, it's kind of both. But I'm kind of very careful not to cross that personal line very often. So that's exciting. And I appreciate that life's happening around them and they want to serve their families and themselves as well. So, to help with those things, I'm kind of like, "Woo, that's cool."

**Jenna Spencer:** Yeah. Visionaries a lot of times are the business owner, and then business coaches are running their own practice. And so, I'm a firm believer that kind of in this trifecta: work, life, and adding the self component. Because, I know for me as a woman, when I think of life, I'm thinking of my children, my husband, my animals, my schedule. It's not necessarily myself and refilling my cup. And so, in thinking about that, wherever you need the most support is going to help you show up as your best self in all three areas. And so, that's why we really lean into that with our clients, because some of our coaches need help with their practice, they need client service, they need email and calendar. But some are like, "I really just want to remember my anniversary, and do a weekly date night, and get all my kids sports schedules on the calendars." And so, wherever they need that support, it's going to help them show up better on the other side of that.

**Shannon Waller:** Nice. Nice. There's about five different directions I want to go in—too many thoughts jamming in at one time. So, I want to go back to the compatibility, because I find that to be extraordinarily important. And having kissed a few frogs myself, I understand how critical that is. And I love that you do Kolbe.

**Jenna Spencer:** Yes.

**Shannon Waller:** You Kolbe your clientele, you Kolbe your assistants. And I think that's so vital. And Kolbe, if anyone's not familiar, Kolbe is spelled K-O-L-B-E, not Colby the cheese. And it measures how you strive, how your mental energy plays out. Does not measure intelligence, nor does it measure personality. You can be intelligent or not. You can be extroverted or introverted, doesn't matter. You can have the same Kolbe result as someone else. So, it's very important to measure, but it's so incredibly accurate. And kind of like you, I won't coach anyone, especially one-on-one, without knowing their Kolbe. That's just not going to happen, because I might give one person one type of advice. To another person, completely different advice, even though they have the same role. So, I want to make sure, I want to personalize my coaching.

And when you're measuring how people strive, super important to make sure that there's a fit. And then I'm also, a big fan of personality fit. Intelligence doesn't hurt either, but that's... Kudos for actually going to that level because not everyone does. And I think, we can like each other, we can both be smart, but when we start doing something together, which is what Kolbe measures, it kind of matters how your mental energy plays out versus mine.

We had a fun conversation before I hit record on this, in terms of how it tells you your kind of own creative process, how much information you need before you take action. Dan Sullivan has a fun way of saying, he said, "It's not the Quick Starts and short Fact Finders don't research, but initiating Quick Start, short Fact Finders, they research after they've made the decision, not before."

**Jenna Spencer:** Yes.



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**Shannon Waller:** Which, I'm sure is some of your clientele.

**Jenna Spencer:** Yes, absolutely.

**Shannon Waller:** Yeah. That's awesome. So, I want to ask you a little bit about your model, because we've got some dear friends and clients who are in the same field as you are.

**Jenna Spencer:** Sure.

**Shannon Waller:** So, do you match people up and then you still work with your thing? Or do they hire them directly from you? How does your business model work, in terms of finding awesome people for awesome people?

**Jenna Spencer:** Yeah. So, we do a little bit of a discovery process, finding if there's that synergy, and we really are the best fit for one another. And then go into the matching phase where we are doing Kolbe and personality assessments. It's a pretty extensive process. And then, we provide candidates for our clients, and obviously, pre-screening them and doing all that heavy lifting on skillset and all those good things. And then, our clients get to talk to a few of the candidates we think are the best fit for really that synergy and just the conversation piece. And then, they get started. So, we offer onboarding support as well. And that is part of our process, that we really take the first six weeks to help them get up and running. Because when you're delegating and working with a new person, there's some speed bumps along the way. Especially with an executive assistant, because they're typically going to do things for you that you've been doing for yourself.

And so, just establishing that trust and getting comfortable with delegating, and someone else doing things for you, that sometimes those squirrels get in and like, "Well, I could just do this faster." So, it's really an investment of your time and energy more than anything, to get up and running. So, really the first six weeks, we help you get up and running, get your first three things delegated off of your plate and get rolling. And then, it does work much like an outsourced support provider. And so, we do provide that support. Now, we do have those matches made in heaven. They're like, "Oh, my gosh, I love this person. I'd really love for them to come with me full time," or what have you. And then we obviously celebrate those, and we have a special buy-out situation that they can go through for that if they want to. And we celebrate that as well. But really, we do provide that ongoing support for our clients.

**Shannon Waller:** I love that.

**Jenna Spencer:** And with that, our clients get assistants who are plugged into our community and plugged into resources and support. We have lots of shared processes, ongoing professional development for those assistants. And so, there's a lot of resources and ongoing development available, too.

**Shannon Waller:** Well, and that's really key, because sometimes strategic assistants can very much be on their own.

**Jenna Spencer:** Yes.



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**Shannon Waller:** Right? And they can get a little lonesome. They're like, "Is anyone else like me?" The answer's yes, but they're hard to find, especially people who work with business coaches and visionaries. I mean, that's different than a typical executive in a corporate situation, which is where a lot of companies are oriented. It's a very different beast. And I say that with a lot of appreciation and love, because that's with whom I love to work. But an entrepreneur is very real, very genuine. If they're happy, you know it; if they're not happy, you know it. There's a pretense. Their lives are often very busy. I mean, my life is very full. It's rich. But there's a lot going on and there's a lot to keep up with. Oh, I have a question. Do you ever find someone needs two assistants?

**Jenna Spencer:** Yes.

**Shannon Waller:** You do?

**Jenna Spencer:** Yeah.

**Shannon Waller:** Oh my gosh, I just thought of that now. There's some people who just create such a volume, especially per Kolbe, if they have a lot of Quick Start for a lot of big projects. So, some people actually need more than one. Let's talk about that for a moment. How does someone know whether or not they need more than one assistant?

**Jenna Spencer:** Yes. So, for us, in most of the situations that we've had, their first assistant gets started with them. And this is really for more So, the business coaches where they are growing together. And that assistant really becomes a right hand. Because most business coaches have their third-party people, like maybe their marketing person or their accountant, legal advisor, some of those things. But then their assistant really becomes the office manager, like the virtual office manager. And so, that person's triaging and keeping everything running and doing kind of the implementation of the business.

But then, because that assistant has become more high level and they're doing more of that piece of it, there's all the smaller things that now need to be done. Keeping the calendar updated, and the back and forth communication, and for business coaches with their clients, a lot of that communication. We have a lot of business coaches that have 35 or 40 clients. And so, managing all of that, and the different questions. So, it's more on the higher level and lower level assistant essentially. Yeah. We do have some visionaries that get into multiple assistant situations. Most of our visionary clients are not super deep into the day-to-day of their business anymore. A lot of them are now writing a book or they're doing some business coaching. So, it's really having one assistant to triage one area and another to really help their passion projects get going.

**Shannon Waller:** Nice. Oh my gosh, that's so exciting. My next book is going to be called *The Teamwork Triad*. And it's going along with the idea of the Make It [Up] person—visionary, business coach, what have you. But then you need a Make It Real person, what we call an Innovation Manager. So, they take your ideas and they put flesh on the bones. They make sure that this sucker can walk and talk, that it should do all the things. And then you need a Focus Manager. And, this is usually a Strategic Assistant, if you're looking at your own personal team to actually manage you.

**Jenna Spencer:** Interesting.



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**Shannon Waller:** Right? It's a triad. I've described it as linear, but really everyone needs to be talking to everybody else all the time. And where one person stops, the other person starts, but they all have to stay connected. And that triad concept comes from the book *Tribal Leadership*, which was written primarily by Dave Logan. Brilliant book. When I first read it, I just lit up because it describes Unique Ability Teamwork from a different perspective. And then, you add in our Visionary, Innovation, and Focus manager, which I called Make It Up, Make It Real, Make It Recur—it all kind of just went click. But that's kind of what you're describing, is someone who can make that passion project real. But the entrepreneur still needs someone who's going to manage them. I think of it as Katrina, my brilliant support partner. She manages me.

**Jenna Spencer:** Yes.

**Shannon Waller:** Technically, I manage her, but that's not actually how it plays out, so, to speak.

**Jenna Spencer:** And my assistant, actually her name is Shannon, and she does a tremendous job of managing me. Some days I'm like, "Wow, she just got me to do that and I feel like I was parented a little bit." That's so amazing. I love it. I'm like, "Oh, this is great."

**Shannon Waller:** I know, right? I look at the number of things I pull off, which if I was in charge of organizing that, I'm sorry, it would be a fraction, small fraction. But I think we counted 53 things in five weeks. But I was on free days for two of those weeks.

**Jenna Spencer:** Nice.

**Shannon Waller:** I'm like, "How in the heck did all that happen?" Because, Katrina organized it, put it in my calendar, had me all set up so I can just hit play and go. So, I love the increase in productivity. So, I want to make a little bit of a compelling offer from both of us, as to why someone should invest in a Strategic Assistant. And I'm using that term, but let me just use support partner, assistant, whatever we want to—Strategic Assistant is a Coach term. Because, it's often the last person they invest in. They've got an entire company full of people. Right? They've hired their legal, they've hired this, they've hired that. But often it's the last person. So, why should someone invest in an assistant? What's the payoff that you've seen and what difference does it make from your standpoint?

**Jenna Spencer:** So, just from the pure emotional side, I will say that you deserve it too. Because leaders and coaches, they are... All the clients that I know, all the great leaders that I know, they're worried about everyone else. They're investing in everyone else. They're taking care of everyone else. They're leading, they're making the tough decisions. And they're leaders at home, they're leaders at work, they're naturally leaders wherever they go. And so, creating that space for the permission to, "I can have one—or maybe more than one—person do nothing but support me," can feel so selfish. And I won't even admit how long it took me to actually get an executive assistant, and I'm in the assistant business. So, first of all, you deserve it too, because it's so important. The feedback that we get from people that take on an assistant, it's like, "Wow, I have capacity. I'm able to get things done."

The people that I want to get the kind of response from me that I normally don't have the time to give them, it's like I have this human filter providing that for them, and I'm getting great feedback that they're feeling heard. So, it actually creates this extension of you, so, that your leadership



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expands even farther and touches even more. Because, you said it earlier, we're never looking to put something on our calendars. We're always at capacity. We're not like, "Oh, how could I fill this free five hours every week on my calendar?" It's like, "How can I fit something else in?" Somebody? And we always want to problem solve, we want to help. So, the feedback that we always get is, "This is wonderful. I actually had time to do something for myself this week," or, "I was able to be productive and I didn't have to burn the candle at both ends." So, I'm throwing darts out, because I'm passionate about it. My brain's firing, but that's where, that's what's coming to mind.

**Shannon Waller:** A hundred percent. And I love how you said it actually. You expand capacity and expand leadership. I mean, yes and yes. I think that's amazing. And I think you get to also, my experience is, you get to show up as your best self. You're being supported. I know, I'm the same; it took me a long time to recognize, and I had often had part-time support. I hired my whole support team when I started Coach, but it was a sales support team. It wasn't actually anyone directly supporting me. So, I'd hired people, built a team, all the things.

But it was years later before... I used to share a support person with two other people. And all of us had very diverse personalities. I can give you their Kolbe profiles. And it was like, the poor person was playing whack-a-mole, and they had to have multiple personalities to deal with all of us. It was a little crazy. I mean, why we thought that would work, I have no idea. So, when I finally said, "I actually need a full-time person to myself," and committed the investment, it was a big gulp. Big gulp. And even, my first one still had another job in the company. So, I still only had a part-time person. And Nicole, and this was probably nine years ago now, so, when Nicole came on board, and it was just her with me, it was like, "Oh, this is different. This is different."

And her incredible 8-7-4-2 Kolbe, her Fact Finder-Follow Thru, she had different motivations, and the yin to my yang. I mean she was just so complementary in so many ways, it got to be funny. We figured out our communication using our Communication Builder tool, and it was just so helpful. And all of a sudden, the leverage I experienced was dramatic. My productivity quadrupled immediately and just continued to get better.

**Jenna Spencer:** All of those little things that we are like, "Oh, it's this project," or, "These things." There's so many tiny parts to that, that could be done so much faster and so much more efficient by someone who naturally can do those types of things quickly. Because for me, putting my thoughts to a keyboard or to paper, I slow down. I mean, it is so hard. And my assistant's like, "Oh, voice text me. Oh, record me a note." So, now, it is on. We discovered that about a year and a half ago and I'm like, "This is amazing." Because I can talk and I can do a video really quickly, but so many things, I was like, "No, I should be able to write this email. I should be able to just do these things—but someone else can do it so much better than me!" Just knowing that [Who Not How](#). Yeah. I was trying to do all the "How" pieces.

**Shannon Waller:** Right? And there's something, and we touched on this before we again hit record, we were talking about, this starts to work when you stop fighting who you are.

**Jenna Spencer:** Yes.





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**Shannon Waller:** When you stop trying to be somebody you're not. When you stop trying to expend mental energy in areas where you don't have any, and you accept who you are. It's only once you actually go, "Yep this is me." And no judgment, good or bad. You go, "This is it." So, I can keep my pace, so I can keep my momentum, because I'm like you; I can talk fast. If I go to write, it's like someone just threw me into a thing of molasses and told me to run. It ain't happening fast. It's just. And so, when you don't accept who you are, as how you are, you actually won't find solutions. And you won't make the investment, because you yourself are still trying. Dan calls this, being a Rugged Individual, right? There's no way Unique Ability Teamwork is even possible, because you're still trying to be all things all the time. So, give it up now is the advice.

**Jenna Spencer:** I know, I struggled with that a lot in my beginning days, because I was an assistant at first and my Kolbe kind of carried me through that, because I have such a high Fact Finder and relatively high Follow Thru. But then I was like, "Well I'm running a company full of assistants. I should be able to do these things for myself that an assistant would do." Not even close.

**Shannon Waller:** No. You should have an assistant.

**Jenna Spencer:** Right? And then my EOS Implementer, Alex, who's like, "You should do a call with Kolbe." And so, I did a call with Kolbe, and they explained my seven Fact Finder, eight Quick Start. And they were like, "These are the things that you're going to..." and you just accept it and this is how you can harness each part of that. I mean it was just like atomic bomb in my brain. It was amazing. And now—we had talked about this previously as well, and you had said it so great—well which hat are you wearing? Which element are you in, in that moment? And just having that acceptance has been so amazing for myself, just to be able to tap into that extra gear. The growth gear. You know?

**Shannon Waller:** Yeah. And once you accept it, all things become possible.

**Jenna Spencer:** Yes.

**Shannon Waller:** You stop fighting yourself, you stop fighting expectations, which frankly probably weren't yours anyway if the word "should" is involved.

**Jenna Spencer:** Right?

**Shannon Waller:** As Dan calls it, "Externally imposed expectation: it did not come from you." And so, once you're like, "Yep, this is me, this is the teamwork I need," then you have power back. Then you get to actually affect the teamwork and that change that you want to make. So, that's so exciting. I love it. I never know where these conversations are going to go.

**Jenna Spencer:** I know.

**Shannon Waller:** So, I want to also, touch on, I mean, you've been doing this for a while now. Actually, couple things. One is, you've got fabulous core values. Would you share them? Because when I was doing my little research, my three Fact Finder research, I was just really impressed with the attitude that you bring to your business. So, can you just share those? And then I would also, love to talk about what you've learned, both from your visionary and business coaches—because



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you have a specialty in business coaches—and what issues they have. And then also, from an assistant side, if you're listening and your assistant, you're like... Hope your ears are pricking up and what could you learn from this? But let's jump in with your core values first because they're pretty fab.

**Jenna Spencer:** Yes, thank you. So, our core values are so important to us, because we are working in a very personal relationship with our clients, right? Because we're providing professional and personal support, and our assistants are delivering that to our clients. So, our relationship with our assistants and clients is just so important, both individually and then that relationship together. So, our number one core value—well it's my favorite—is, just “Here to serve” because we are here to serve. That's what we do. All of our assistants have a heart of service and we want to be that person behind our client that is leading and serving others in their world. Our other is, “Integrity driven.” So, part of growing up as an entrepreneur around EOS, it was always *do the right thing* and *do what you say*. So, integrity's just so important, because my mom and my family, just how I was raised, is just always being who you say you are. Let your actions speak louder than your words. And so, that's how we screen all of our assistant. It's just what are their actions? Show us. just be a person of integrity.

The other is “Collaborative mindset.” So, really having that collaborative approach because working with visionaries and business coaches, there's a lot of collaboration that we can bring to the table for them with all of our experience. So, whether they are scaling their practice or they are just getting established, what are the different proven processes they're looking for? Are they in Strategic Coach? Do we have those resources since I've been in Coach? So, just really looking for how can we collaborate together and help that common goal be achieved.

And then the other is, really copied that from EOS, but because I love them so much, and it's just “Grow or die.” And I love that so much, because you know, what you don't feed dies. And so, how can we always be growing? And my very first boss ever was like, “Just try to learn something new every day.” And I literally still do that. We teach that to all of our employees. And just what can we learn new today? Even if it's something small, what's the golden nugget today? Because it'll benefit your life somehow in some way.

**Shannon Waller:** I love that. That's such a great life takeaway. What have I learned today? It's like, okay, I hope my kids are doing this. I want them to do it. It could be something technical about how to use a program. It could be a new truth bomb that just explodes in your brain, as you talked about. I was just recording the next Quarterly Book that I do with Dan this morning, which is *Thinking About Your Thinking*. And it's like a couple times when I'm, fwoowh, “That is the coolest thing ever.” So, yes, I know. If I'm not learning, I'm dying. That's pretty much how I feel, too. And Babs' slogan is, “Always Be Growing.” And “Grow Or Go” is another expression that I also, like.

**Jenna Spencer:** I like that.

**Shannon Waller:** And, I want to go back to your number one, though, about support. I'm certified in [DISC](#), which one of the adjectives describe each of D-I-S-C is dominant, influencing, supportive, and conscientious. Okay. There's other adjectives, too. There is such a thing as a supportive personality, and given that I'm all dominant, all influencing, that's me. But if I'm doing that, I need someone to back me up. And when I finally realized... Because I tried being supported by people who were not that; didn't work out so well. And one of the things that impressed me about Nicole,



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well first of all, she knew herself, for which I am very grateful. Because she says, “I have tried other roles, I know I am best in a support role.” And I was like, “Who are you and where have you been all my life?” So, shout out to you, Nicole Pitcher. She’s gone off to her own yoga business now, if you were wondering.

**Jenna Spencer:** Oh, awesome.

**Shannon Waller:** Yeah, she’s great. So, she became an entrepreneur. But it’s so powerful. I’m like, “Oh, that’s what I’ve been missing.” And it’s a thing.

**Jenna Spencer:** It is.

**Shannon Waller:** It’s, someone’s not doing it because they’re a frustrated you. They’re not doing it because they weren’t successful at something else. This is actually what they’re here for.

**Jenna Spencer:** Right.

**Shannon Waller:** And, this gives them fulfillment and them satisfaction. So, it was very refreshing for me to learn that I wasn’t actually in competition with the person supporting me, and that, that was fulfilling for them. And if I were to do what it wouldn’t be, but what I was doing was fulfilling for me. So, that really did feel like a great integration. But that was an insight for me when I first started having someone directly support me. But that is some people’s jam.

**Jenna Spencer:** Yes.

**Shannon Waller:** That’s what they love to do.

**Jenna Spencer:** Yes. Oh, my gosh. And it’s so interesting to me because we get a lot of assistants that really doubt themselves sometimes. Like, “Well I don’t have a resume,” that “I haven’t been an executive assistant, but I love supporting my family. I schedule all of our travel vacations, and I run my house this way.” And so, when we were getting started, a lot of those assistants are still working through us to this day. And I love the relationships that we have with them. But that’s what they love to do.

And so, I always tell my clients that once an assistant knows you, it actually doesn’t matter what you go on to do. Their skill set is always going to be able to support you in whatever that is. For certain things, you obviously need a very technical assistant. But for a lot of things, and having that executive assistant, once they understand you, your preferences, how you communicate, and they’re that right support person for you, doesn’t matter what you go on to do or how many businesses you start. They know you and that’s what matters.

**Shannon Waller:** See, that’s powerful because I don’t think... I was thinking about this when you talked about the collaborative, I’m going to call it ground rule but your core values too, is that a lot of people think of it as a role or a position, but it’s actually a function. That can be with you. You can have your own personal support team, regardless of what the heck you’re doing. This is kind of *The Teamwork Triad* idea. So, most people have it as being separate, it’s part of the role of the company, but actually this person is in Unique Ability Teamwork with you.



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**Jenna Spencer:** Absolutely.

**Shannon Waller:** And that's a different perspective; it might be subtle but it's key. And what I also, love, going back to your collaborative part, is a lot of people think of it as a hierarchical relationship. And technically from a power seat, yes, maybe it is. But in my standpoint, collaboration is like, "Okay, you have a Unique Ability, you have unique skills and talents I don't have, and I've got mine. How can we collaborate? How can we coordinate?" So, that's why I actually call Katrina my support partner, because A) I don't want a manager, I don't want someone to manage me. And also, she's my collaborator, she's my partner. I want someone who is capable and confident in her area as I am in mine. Right?

**Jenna Spencer:** And I love how kind of the stereotype is changing for assistants. Gone are the days of "go get my coffee and my dry cleaning for me" assistants. And I'm reminded of this every time I look at my calendar, because I'm like, how my Shannon figured out how to get tennis on my calendar every day, and for me to be a mom, and I'm doing all these things for work; she is a magician. I don't even know how she makes that happen. I just know that I sit down at my desk, I look at what's on my calendar, and I do what's in there and all the things get done. But yeah, I'm living life and playing tennis and raising three children. So, I love how you actually say that. So, that's a really great nugget for me, my support partner, because it definitely is not that situation... We really are partners, and what she brings at the table, she's done it way better than I ever did, clearly.

**Shannon Waller:** A hundred percent. Just the little thing about the naming, which I kind of find fun. So, I was stealing a term that I heard from Tony Hsieh, and that was CEO of Zappos, and he had someone in, I think it was Scheduling Ninja, but it was Ninja. And so, I applied this to Nicole, and if you remember Nicole, she's got blonde, wavy hair, looks a little more bohemian, mind that is razor sharp, make no mistake. And she said to me, she goes, "The word ninja, it just doesn't quite feel like me." And, she said it very politely, because of course, I would love the term ninja. So, I was projecting onto her and I'm like, "Okay, well let's come up with a term." So, finally come up with Scheduling Goddess, which totally suited her.

And then we ended up with, we played around with support partner and for her—because, given she had, what, four Strategic Thinking Strengths and per [CliftonStrengths](#)—with Strategic Support Partner. So, that was her title. And sometimes I'm like, let me introduce you to my Scheduling Goddess, which was kind of fun and it's playful, but it's Unique Ability focused. But it totally elevated her to be clearly much better than I was.

Dan has a great expression. He goes, "My security clearance doesn't go that high," which is true, if anyone's wondering, for me and for Dan. I think when you start to see it as a compliment rather than the old version. So, yes, I completely agree. It's wonderful to transcend that pretty limiting old approach. And to my mind, that actually gives me more confidence as someone who works with a support partner, is like, "We can be collaborators, we can be partners for one another. And I can count on you and you're going to be happy doing what you're unique at, to free me up to do what I am." But I love what you said, "How can I have this great life?" And you didn't have to organize it. Shannon did.

**Jenna Spencer:** Yeah, it's amazing.



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**Shannon Waller:** I have exactly the same sense.

**Jenna Spencer:** Some days, it's like I have my cake and I'm eating it too. What's going on here? But it really is the power of having a great assistant, having a great partner, someone with those strengths that I don't have.

**Shannon Waller:** I love it. So, last thing I want to talk about is, so, I think we've talked about why, we've definitely made a compelling offer about that. So, thanks to Dean Jackson for that concept. But let's also, talk about from an assistant standpoint, if someone's a Strategic Assistant and they're working with a visionary, or a business coach or another kind of leader, what do they wish visionaries and what do they wish people would know? What are some of the obstacles that assistants face, when they're trying to do what they're best at? What are some of the obstacles that you see, especially in those for six weeks that you talked about? What are some of the things that we have to retrain—for those of us that are leaders—what do we have to shift in our thinking or actions to make it work better?

**Jenna Spencer:** That is a great question. So, I think the biggest one is that, so, I'll speak just from we perspective. We assistants, that we can't do everything, all at once, right away out of the gate. Because with visionaries it's like, "Okay great, here's everything." And then we are moving fast. So, a lot of times it's out of our hand. We're like, "Oh, great." And so, then it's like reality sets in a little bit and then it's like, "Oh, wait. Okay. We have to work through this and kind of get up and running."

So, my role that we do in all of our onboarding and all of my teaching at AssistPro is the rule of three. So, delegate three things at a time, no more, no less. And out of those three, what's the one that you really want as your priority? And so, really understanding that it's just not going to happen overnight with everything. So, we can download all of that information and say, and paint the picture of, "Great, here's where we want to be," but then building out just the realistic timeline of how long it's going to take to get there. So, depending on that timeline, really six months is where you can hit a good groove with majority of what you want to delegate.

The other is, really know what it is that you want to delegate. So, take that time to write out or get it out visually, audio, however, of what it is that you want to delegate. Because sometimes we will realize that it's actually a responsibility that you're delegating, and not just individual tasks. So, thinking about how you delegate, we want to be in that spot where you're not asking repetitively for that thing to be done, but you've actually delegated that responsibility. So, we really need the detail of, "Well what are all of your preferences on this?"

So, we need that space to be able to ask those questions. But then once we have it, we can oversee that responsibility. You don't have to keep it in your brain anymore. We can say, "Okay, great. Now it's time to do this for this month. For next month, here's all the questions that I have for you." And then we're streamlining, we're working a lot more efficiently and quickly. And, being able to be that better support person for you is really that other piece. And then, when we say, "Hey, I could do that for you." And it's like, "No, no, no, I could do that." Just say, "Sure, why not? Go ahead. Take a stab at it."



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**Shannon Waller:** I love it. Listen, let me just bottom line that for me, too. This is so deadly, especially for someone with a Kolbe profile like mine, 3-2-9-5, which is like, okay, just because of the speed of me communicating to you is not the speed it actually takes to get done. So, remember that things take your time, especially since I'm, I tend to do, "Okay, what's the quick and dirty solution?" Because I'm like, "Okay, what can I do fast," because that keeps my energy high. That may not be the best solution. So, being willing to be educated in terms of how long things take, I think it's key. And then being open to the back and forth.

This is why... If you're a Coach client, you know with [Impact Filters](#), so, set out the success criteria. Let people know what "great" looks like. Let people know when you've done it before and it failed miserably. Those stories are very educational. It's like, "Okay, don't do this like I did because it just went to..." you know where it happens. And so, letting people know what the success criteria is, or what drives you crazy, is great communication. And then the last point you just made, what was the last point you made?

**Jenna Spencer:** Oh, actually releasing; saying yes. Letting us do new things for you.

**Shannon Waller:** Yes. So, the word "can" is really interesting. "Can" is a statement of capability, but that only lives in our brains. Then there's "want" that lives in your heart; do you want to do it? And then the bottom line—and this goes back to Kolbe, which measures how you strive, which is the technical word is conation or conative—is "will" you? Just because I can doesn't mean I will.

**Jenna Spencer:** So, true.

**Shannon Waller:** Because, I will postpone, I will procrastinate. It goes on the bottom of my to do list because I don't really like it anyway. And so, when someone gently asks you, "Oh, can I do that for you?" What they're really saying is, "You're not going to get to it. I can take care of it faster." So, instead, I always have this—I guess it's a metaphor—you have a [Unique Ability Relay](#) is like a relay race. And in any relay race there's a baton. Two rules: Make sure you have the right person, the right position in the race. (By the way, people have told me this, because I've never run a relay race in my life. Let's be clear.) And the second thing is, don't drop the baton.

Now there's a couple other things you can do with the baton though. One is you can whip it at someone's head. That's called the "drive-by delegation." Not good. That's not being available for the back and forth. But then there's also, the death grip. (I literally am holding, you can't see me right now if you're listening to this, but I'm literally holding onto a red baton.) Don't have the death grip. This is either hang onto something you shouldn't, or you pass it off but you don't actually let go—also, known as micromanaging sometimes. So, when someone asks you nicely, say yes, is what you're saying. So, just really powerful points. That's awesome coaching. Thank you, Jenna.

**Jenna Spencer:** Thank you.

**Shannon Waller:** You're welcome. And there's some great tools you have for people to figure out what they can delegate, how much time they'll save. You've got some great downloads on your website, so, if people want to know more—from either they want to be an assistant and work with you or they'll look like, "Oh my gosh, I need one, two, three assistants"—how can they find you? And what cool tools do you have that people can access?



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**Jenna Spencer:** Yes. So, we have some really great tools. One is our accountability tool. And it's really great, because it helps you brain dump all of the things that you could delegate, but then actually regroup those things together into umbrellas or buckets where that's actually a responsibility that you could delegate. That's one of the biggest things we see with our clients is that, "Oh, I could actually delegate these 12 things," but really it's three key responsibilities that you need to delegate to someone. So, that's a really great tool. If you're just thinking about, "Should I delegate? Do I need to? What are all the things that I could?" That's a really great tool to use. You can find that on our website, [AssistPro.com](https://www.assistpro.com). You can also, find all the great resources and you can connect with us on the website as well. That's the best way to get in touch with someone from our team.

And, even if you're thinking about joining us as an assistant, or even if you just have questions as a client, we're here to serve. That is what we are here to do. So, even if you're just exploring or you have some questions or, "Hey, I've tried this, it didn't work," give us a call. Connect with us on the website, [AssistPro.com](https://www.assistpro.com). We'd love to talk with you. And we do talk with a lot of people that aren't ready for an assistant yet, or still kind of figuring out what they need to delegate. And so, we just love helping people on their journey to delegation, no matter where you're at on that journey.

**Shannon Waller:** A hundred percent. And I know for me, when I've hired my very, very, very first person, it was a big courage. Our [Four C's \[Formula\]](#): commitment and courage [capability, and confidence]. And then it was, I shared a part-time person with somebody else. So, I had a quarter of a human, and then she wanted to hire somebody else part-time. She's like, "Can you take over this person part-time?" And that's what I dithered about for a few weeks. And finally, "Do I have enough work? Can I afford it?" All the things. And then as soon as she started, about two weeks later, I'm like, "How soon can you go full-time?"

**Jenna Spencer:** Yep.

**Shannon Waller:** Right? So, I love having this conversation about how valuable assistants are, and you gave phenomenal list of reasons why they're so great. So, to leverage the expansion of capacity, you being the leader that you want to be, and having a great life—which is what we all want—is true. And if that's not enough, it's really important to remember that if you don't have an assistant, you are one, and you may not be the best.

**Jenna Spencer:** That's right. Yeah. And you are earning the rate of that assistant while you're lowering the value that you can bring. And so, that was one thing that my mentors—it's always stuck with me—it's to the degree that you can delegate off of your plate, that's the degree to which you can grow as a leader and grow your business. Just looking at that, it's an exchange of time. We all have the same amount of time. So, what are we doing to fill our time with?

**Shannon Waller:** Brilliantly said. Awesome. Thank you so much, Jenna. I love talking with you about something that we're both so passionate about and know is so incredibly valuable. So, helping people get their heads wrapped around it, understand it, knowing how to think about it, I think is really important. So, thank you so much for sharing yourself and your wisdom with me today. I really appreciate it.

**Jenna Spencer:** Oh my gosh, this was so much fun. Thank you for having me.



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**Shannon Waller:** My pleasure.

**Jenna Spencer:** I loved it.

**Shannon Waller:** Great. Thanks, Jenna.

**Jenna Spencer:** Okay.