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How To Hire And Retain The Right-Fit People For Your Business

Shannon Waller: Once you've hired the right people, the right "Whos," now what? Stay tuned for a fun and enlightening conversation with Alec Broadfoot of VisionSpark, where we talk about not only how to hire great people, great "Whos," but also how to onboard them and how to keep them. Stay tuned.

Hi, Shannon Waller here and welcome to Team Success. Today I'm talking about a very important subject about onboarding some new hires with my dear friend, client, colleague, peer, and all things people, Alec Broadfoot from VisionSpark. So, Alec, thank you so much for joining me. In our pre-conversation we already covered about 18 different things we should talk about today, so I am very excited to have you back on the podcast to talk about I think a step that a lot of people are tempted to skip over, not give it its due, so I'm excited to dive in. But before we do, first of all, just welcome again back because I've had you on a couple of times where we've had opportunities to speak together. So I know you through Strategic Coach, I know you through VisionSpark.

You have a phenomenal profile that you use in your very robust hiring process called Achiever, which I'm a fan of. And then again, you help entrepreneurial companies find the right "Whos." So you're a "Who" finder, in Strategic Coach terms, and someone who really knows the Strategic Coach community, who knows the EOS community really well, entrepreneurial operating system. So first of all, thank you for being such an amazing human. You and myself and Emily have done lots of WhoNotHow webinars, which has been really enjoyable, so this is just another phenomenal chance to collaborate again, so thanks for being here.

Alec Broadfoot: Thank you, Shannon. It's really good to be here, and it's one of my favorite subjects that I think is completely underestimated and the importance of onboarding. So if we can onboard our team members correctly, sky's the limits.

Shannon Waller: Fantastic. So you've had deep experience, and through your work at Vision Spark. So let's just talk about the context of how you have come to have the expertise, the insight, because we're going to talk about what to do, what not to do, how to think about it, myths, oh, my God, myths around hiring-

Alec Broadfoot: No problem.

Shannon Waller: ... return on time invested. We're going to talk about a lot of key things that you have really discerned from your many years of experience. So let us start a little bit before about Alec and Vision Spark before we jump in.

Alec Broadfoot: Yes. So we've been in business over 10 years and what we do I think really well is we help entrepreneurial companies find and hire the right leaders, the right second-in-command integrator, leadership level positions, so these companies can be self-multiplying. We



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have a proven process. Our success rate is 96% compared to the industry average of just 60%, so it's a proven process and I think we're doing something right with clients that come back and say, "Man, you helped us hire a great integrator. Can you help us hire a great VP of sales?"

Shannon Waller: Right. Fantastic. I love that depth. And first of all, kudos on the success percentage. That's huge, especially since the average is only 60, which is not fabulous. Most of us have had experienced that for ourself and having a proven process which you worked on. You have refined this over the years. But once you've got the right person, there's a massive opportunity for it to still fall flat, right? Presuming you do have the right person, we'll talk about that, too. But let's talk about onboarding. First of all, what is onboarding and why is it really important? How do you define onboarding? I know how I think of it, but I want to make sure we're all on the same page.

Alec Broadfoot: Yeah. So the hiring process doesn't stop once they walk in the door. You have to see them to the finish line, and so onboarding is really getting the new hire ready to be successful in the role. So you're not done with onboarding until they're succeeding and they're contributing and they don't need you on a daily basis. So it's really getting them so they're successful.

Shannon Waller: Cool. And does it start once they've said yes? Because there could be a time delay between that and when they start, or does it start when they start? Their start date? How do you like to measure it?

Alec Broadfoot: It's all about the experience with the candidates. So as you're interviewing them, they're like, "Damn, you've got a lot of steps to your interview process. You must really care about who you hire." So at the end of the process they're like, "Man, this has been a great experience." They get to know you. It's a courting process, right? They get to know your culture, and so you're allowing them to see who you are. It's a courting process. Do I want to work for this company? It's a two-way street. It's not just one way. And then once they come on board, you want to continue that care and you just spent a lot of time hiring them.

So the numbers say if you hire the wrong person it costs up to three times their annual salary, so if it's a 100K person, that's a 300K cost. So what are those costs? Well some of them is opportunity costs, recruiting costs. So now you've spent all this time, now let's make sure that they're going to be successful. And at Strategic Coach we talk about employees not as an expense but an investment. So you just invested in this new key person, so how do you get the best return on this investment?

Shannon Waller: I really appreciate you bringing this in because there is an appropriate mindset that goes along with this, which is, it's not transactional. I think hiring people, a lot of the stuff that you hear, I hear from people is like, "Oh, why don't they just show up and do their job,



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damn it." And there's usually some swear words that go along with that, and people get really frustrated because they just want it to work. They just want a Self-Managing, Self-Multiplying Company, thank you very much. And they don't want to have to engage with the other human. They just want to wave a magic wand and have it happen. Which I can empathize with. Some days I want that too because it feels challenging. But truly this is a relationship, rather the mindset to have is that this is an ongoing relationship.

This is a part of your team. This is what's going to really help leverage you as an entrepreneur, as an owner, as a leader. This is a leverage opportunity for you. This is going to free you up. This expands your freedoms—time, money, relationship, purpose, as part of having a Self-Managing and Self-Multiplying Company. So having the right mindset means that you are much more likely to take the right actions, otherwise you'll probably skip these steps, have paid not the 100 but the \$300,000 cost because you simply haven't looked at it as an investment. You haven't looked at it as a relationship. And I think checking your mindset, if you have a relationship-type mindset, or you can call it transformational versus transactional, then, again, you're going to be much more open to what we're talking about today.

Alec Broadfoot: Yes, yes, absolutely.

Shannon Waller: Great point Alec, thank you.

Alec Broadfoot: Absolutely. And when you're interviewing you want to have the mindset to disqualify, too. So you need to treat them really well, need to be kind because they are human, they could be with the team long-term, but we have to hire the right people to have successful onboarding. So if we hire someone who's a quick learner that fits with our core values, they're going to be much more of a long-term fit and a much better onboarding experience for both the employer and the employee.

Shannon Waller: I love that idea of disqualifying. You have a couple of provocative questions to ask, which I think are really powerful because what you're talking about to me is standards. It's really important to have standards, but you're actively looking to disqualify someone because that really sets up to have the right qualified people, if I understand correctly.

Alec Broadfoot: Absolutely. Right.

Shannon Waller: Nice.

Alec Broadfoot: If you can't disqualify them, then they're worthy to move on to be a part of your company.

Shannon Waller: I like that story.



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Alec Broadfoot: So many times we try to qualify them because we like them. And entrepreneurs, visionaries, my friends at Strategic Coach, we love people and it's easy for us to hire.

Shannon Waller: We love selling.

Alec Broadfoot: We love selling, yeah.

Shannon Waller: We sell our damn company and then people are like, "Oh, oops."

Alec Broadfoot: Yeah, it's been said that a typical interview is a conversation between two liars, right? So you got the visionary that's selling their company, not that we're liars, but we get excited about it. And then you have the candidate that is selling themselves, and then what happens? You're on the road to Abilene, and who's this person I hired?

Shannon Waller: I love that. So let's jump into some of the questions that you ask because you've got some great questions. One's based on the R-Factor Question from Coach, another one that you had already that kind of goes along with the same line of thinking that we've been talking about. So what are some of the questions that you find really helpful to help qualify and disqualify people?

Alec Broadfoot: Yeah. So, are you asking about the interview process?

Shannon Waller: Yeah.

Alec Broadfoot: Yeah. So, I mean, there's so many questions, but I'll give you an example of a question that we'll ask someone who's going to be an integrator and they have some sort of managerial level position. We'll ask them a question, for example, "What have been some of your greatest accomplishments as a leader and manager?" And oftentimes, over half of the time, they'll say, "Well, my greatest accomplishment was, I got to grow this business from X to Y," or, "I got to start a new operation in Batavia, New York," or whatever. Those are the wrong answers. What we're looking for is that they need to say, "My greatest accomplishment was building a team and seeing others succeed." If they don't say that, we disqualify them. So we have a couple different rounds of interviews.

The first round is about eight questions with sub-questions. And then the second round is about a 90-minute interview, 36 questions, sub-questions, and it really separates the pretenders from the contenders. That's been a while since we've done this, but we looked at our clients and we said, "Okay, now, who are the most successful candidates?" And then we looked at their interview scores and 90% of those candidates that are excelling with our clients had the best interview scores. Another way to really have some good interview skills is to have them share



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specific examples. It's a twofold question where you ask a closed-end question. "Shannon, would you describe yourself as a good communicator?" So you're getting them to go from, "You were just asking me about problem-solving, now you're asking about communication."

So it allows them to transition in their mind and then you follow it up by using the words, "Tell me about a time when." So, "Tell me about a time when a breakdown of communication created a difficult situation for you." Now you're looking for a specific example. And in this day and age where information is accessible everywhere, getting specific examples add credibility. You need to say, "Alec, let me tell you about what happened this morning when I was talking to my assistant. I didn't clearly articulate." That's going to add credibility as opposed to, "Well, as humans we need to communicate better. Communication is the source of all problems." That does not add credibility. So those are a couple of examples of how we disqualify in the interview process.

Shannon Waller: I love it. And as soon as you ask that question, I can answer it like... Just come to mind immediately. One's quite an old one, one's from last week. There's all the things. I love it. Now, in the hiring process, because you made this point when we were talking earlier, when you're onboarding, you want to be onboarding the right person. So really this is the context for actually having a successful onboarding process. Onboarding the wrong person, wrong fit person, not actually very strategic. So, I love that we're doing this setup with this. You ask another three-month question.

Alec Broadfoot: Yes.

Shannon Waller: Please say it the way that you say it because when I heard it I was like, "Whoa, this is genius."

Alec Broadfoot: Yeah. When you start the hiring process, I would recommend asking yourself The Dan Sullivan Question, the R Question. So you're looking to hire an integrator, you're looking to hire a salesperson and an executive assistant. So you put yourself ahead in time and say, "Okay, if I was talking to this new hire a year from today, what has to happen for me to really feel like they're killing it in their role?" And just take some time and journal it. Journal it out.

That is a key question, and put that down because you're going to use that information or put it on the position profile to put it on the 4x4s and we'll talk about that later. But the other question to ask is to reverse it, and that's to say, "I hired this person and in three months or in two weeks, I'm firing them. I'm letting them go. I'm terminating them." What are they doing to be terminated? What are they not doing? So those are the two ways that you can use that question to get really clear.



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Shannon Waller: I love this question because I literally just had a conversation this morning with someone who'd made a new, very senior team leader hire, sales and marketing, and there were two things he said. He said, "First of all I think the person is guilty of corporitis." And I threw up my hands because that was why I wrote *Multiplication By Subtraction*. I said, "Have they read the *Team Success Handbook*? Because that's all about having an entrepreneurial versus a corporate attitude." He goes, "No." I'm like, "Okay. Put it on his desk or get the Kindle copy, whatever works, because otherwise it's going to be a multiplication by subtraction scenario."

And the other thing he said that drives me crazy, we literally talked about another one of our tools, the 4x4, because what drives me crazy, which is section 4, is not knowing your numbers. He said, "There aren't that many numbers to know." If you don't know them, we're done. So, so clear. And he had done a 4x4 with this person when they started two-and-a-half months ago so that tells you what direction it's going. But I found that so interesting. So knowing what your tolerance level is, because you can love them, they can be a great person, but if they do a few things that are going to tick you off to the point where it drives you crazy and you don't want them in your company, they're gone.

Knowing that for yourself and articulating that to the person is first of all just good teamwork because then they know where not to step in it, is how I think about it. But you had a way to address the corporitis. And just to set this up, I coach people a little bit on hiring, not nearly to the degree that you do, but some people like to use me as a sounding board because there's something when someone comes in, and I have a little test, if someone loved being part of a large corporate organization, I usually think they're not a right fit for an entrepreneurial company. If they were super frustrated working for a large corporate organization, I'm like, "Okay, then they've got a chance." But if someone loved it, an entrepreneurial company is just too different a mindset. So what's your take on that? Because you have a great insight I'd like to hear.

Alec Broadfoot: That's very different and when we work with our clients to find senior level positions, it is not uncommon for them. We'll ask them, say, "Hey, what are behaviors, traits, and values that you want to see in this person?" So we do this brainstorm session, but it's not uncommon. I'd say 80% of the time they'll say they need to have small business experience, and if they don't say it, I'm going to suggest it. So the reasons why is corporitis, individuals in corporation, in my mind they lack the resourcefulness to work in a small business. They're working with other people's resources, they have budgets, they have people.

And you go to a small entrepreneurial company, who are agile and tenacious and quick, and there are limited resources. You're not spending revenue, you're spending profits. So they have to be resourceful. And so what we look for is, did they grow up in a small business? Did they work for a small business in some part of their career? We will have a questionnaire that we ask



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them in our applicant tracking system. "How many years of small business experience do you have?" So that is super important in hiring individuals for an entrepreneurial-type company.

Shannon Waller: Well, I so love that, and it turns out that resourcefulness, and by the way, our performance is alert, curious, responsive, and resourceful. And when Dan was writing out the list, I walked by him in our café in Toronto, he had alert, he had curious, he had responsive. And I had just read a precis actually of Dr. Brad Smart's book called *Topgrading*. And the precis was great because it's basically a tome. It's 700 pages, it should have been three different books, which he agrees with. Anyways, just read the precis of it. But the number one characteristic of an A player, which is the best quality person you can get at that pay grade, so it doesn't matter what in the organization is, guess what? Resourcefulness.

Alec Broadfoot: Yes. Definitely.

Shannon Waller: So, we are all aligned. And you're so right. There are constraints in an entrepreneurial company. You don't have budgets and approvals where you don't have to have full responsibility and tons of people lying around to get your work done. No, no, no. That person's probably you. So, yes, yes, and yes. See, we're always on the same page, Alec. I just love this.

Alec Broadfoot: We are.

Shannon Waller: So it sounds like you talked earlier, you will get to know what you want, the candidate also through this process gets to have more self-awareness as well, so they can better judge whether or not they're going to be a right fit. So I love the enlightenment that happens in the very intentional conscious process that you have. So let's presume that someone has jumped through all the hoops, you've said yes, they've said yes, you've agreed on the salary expectations, all the things. Now what happens? Now what?

Alec Broadfoot: Yeah. You let them know their start date. They come in, and what we do here at VisionSpark for our new employees, we have a gift waiting for them. We have a card from everybody. You really want to make them feel special. But the answer to getting the most out of your new hire is time. That's the answer. You want them to have a schedule, who can they shadow? If it's an integrator, they should be shadowing the visionary for two, three days. You want them to shadow with different stakeholders, their hiring manager, their peers, their direct reports, spending a lot of time with them, and then have a daily check-in with them at the end of the day. 4:30 say, "Hey, how'd it go today? Let's do a Positive Focus. What worked well? What could be better? What are some of the things you're noticing? What questions do you have?"

That's super important, and you can wane that time with them. So maybe in three weeks or two weeks, it's a weekly meeting, and then it can go to a monthly meeting. So a quick story, and I'd



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like to share this story. A friend of mine wanted someone to come in. Him and his wife had a really strong business and he wanted a salesperson to help with the revenue in the business. So he was responsible for the top line. So him and his wife decided to move outside of Ohio and they moved to a different state, and he hired a salesperson. He didn't use VisionSpark, and he called me a couple of months later and said, "Alec." And he's in a new location, and it's like, "Alec, the salesperson is not working out." And I started asking questions and one of the questions I asked him, "Well, how much time are you spending with him?"

He's like, and he was really proud, "Hey, I spent 30 minutes on a phone call with them every Friday." And I said, "Wait a second. This person's responsible for 100% of your revenue, and you're doing a 30-minute check-in call every Friday?" I said, "You need to be spending the first couple of weeks, an hour a day at minimum with them. They should have been shadowing you. I don't think this person's going to work out." And sure enough, they didn't work out. He learned his lesson the hard way, cost him a few bucks. So, you want to spend time with the person really making them feel cared for and special that they learn, that they see themselves an important part of the culture and part of the team. So that's the answer, and we don't want to hear that sometimes, but they are an investment. You just spent all this money and time hiring them, you got to make sure you're seeing them across the finish line.

Shannon Waller: Yeah. It reminds me of dating. When you're wooing someone, you show off your best self, they have lots of time and attention, and as soon as they say yes, it's like you're onto your job or something else. You're like, "Oh, okay, that's done." But we need to keep going with that time and attention because that's how people are going to thrive. And you just reminded me, I haven't thought of this for years, but originally I was hired by another salesperson at Strategic Coach and I came in and I didn't have an office. Strategic Coach was wee. I was number six. But she set up... Was then, it was a conference table, which actually was where Dan sat. I brought my own computer, that was part of the deal, but she had pens and papers and Post-its and just set up a little area for me, probably a mug.

And I just felt like I wasn't an afterthought. It was intentional that I was there, and that set the tone. And if I'd had to scramble, that would not have been a good feeling, so that is such a good point. And then I literally sat and listened to her for three weeks, and then she was a brilliant salesperson. So, yeah, all the things you're saying reinforced my own very early experience, but it's not how you've been spending your day. So it does take a shift in like, "Oh, yeah, I need to include this person." And most of us are fairly independent, so we're not used to have someone trailing us. And then being on Zoom with people, if that's how you're working, that's a whole other deal. So I imagine it's a bit of a shift in habit to have this happen.

Alec Broadfoot: Yes. And it's short-term. It's short-term. I hired a salesperson in 2019 and I had that person shadow me every day for the first two weeks, and they were really good for advocating for themselves. "Alec, I have this client opportunity, can you help me with it?" Or,



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"Here's my approach to it." So that time you spend with them is invaluable, but then they're a rockstar and you're like, "Well, how did they get to be a rockstar?" Well, it's because you spent time with them in the beginning.

Shannon Waller: And they got to watch you. That's the other thing you [inaudible 00:21:57].

Alec Broadfoot: Yeah. Yes.

Shannon Waller: They might as well learn from the best, right?

Alec Broadfoot: That's right.

Shannon Waller: And you said something about the Positive Focus, and we just had a new person start on my team who's a total dreamboat. Love this guy. His name's Chris. We were talking about the Positive Focus, and we actually start people with something called the 21-Day Positive Focus. For some reason he hadn't gotten it. So I'm like, "Oh, go remedy that right away," which he did that afternoon, so we're back on track. But I think it's super important for people to appreciate that when people start a new job, the learning curve is incredibly steep. Like, "Where are the restrooms? How does the photocopier work? How do you answer the darn phone?" It's those stupid little things.

But you can feel stupid if you can't figure them out, or if everything is brand new. And we're a Mac environment. People are used to working on PCs. Just sometimes subtle but essential things. And if people can write down their wins, I don't actually care what their wins are, to be perfectly honest, I just want to know that they know what they are. So it's not about judging whether or not someone's achievements during the day. They didn't get lost in the way in and out of the building. Awesome. That's a win. I'm directionally challenged, so that's why that would be on my list.

But just having someone track their wins, their progress for 21 days, means you can dramatically shorten the length of time it takes for them to feel confident, capable, and engage with their work. If people are in The Gap, where they're measuring themselves against an ideal, it totally gets in the way of them being effective. So just reinforcing the wins or using Strategic Coach's 21-Day Positive Focus, which is just a little booklet, it's cute, is so reinforcing of that super steep learning curve and then they can get where they're going faster. So yes, I love that that's part of both of our process.

Alec Broadfoot: Yeah, that's great. Yeah, that's great. So the more time you spend with them, the greater return on investment.



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Shannon Waller: Cool. There's also a few Gallup questions that you like to make sure that people think about, too.

Alec Broadfoot: Yes, the Gallup Q12 has been around for a long time and I come back to it a lot when people ask me questions. It's really rich in information. So number one, I know what is expected of me at work. They have to know what success looks like. You have to tell them how you'll be measured. I have the materials and equipment I need to do my work. Right. This is super important. I learned this years ago. I was interviewing a franchisee for McDonald's and he had owned a bunch of McDonald's. This is back in 2004, 2005. And I said, "Hey, I bet you you have super high turnover."

And he said, "Actually we have the lowest turnover in the region." And I said, "Well, is that because you pay more?" He's like, "No, it's not." He said, "A lot of times people will leave their jobs, they'll leave McDonald's, because equipment's not working right. The cash register, the fryer. And so I make sure, wait, we are on something like that. And so they're not frustrated. That's our job." So I learned that lesson and at VisionSpark I'm like, "Okay, do you have what you need? Do you need a standup desk? Do you need a monitor? Do you need a different chair? How's your back?" Right? So you want to make sure that they have the equipment they need at work.

Shannon Waller: I want to jump in here because this is so key. It was fun. I was talking to my brilliant support partner, Katrina, and I kept hearing the fan come on in her computer, and it wasn't terribly fast. When she started a year ago it was probably one of the older computers we had, and she wasn't being proactive. She's very supportive and nice and sweet and all those things. So I'm messaging the head of tech. I'm like, "Glen, this computer is crap. It's not working. I can hear it on recordings and stuff like that." So she just got a new computer that's wicked fast, probably faster than mine right now. The resolution's certainly better. It's a brand new Mac.

She goes, "Thank you." I'm like, "You need the right materials to do your job." She's looking at the screen seven plus hours a day. It has to work and it has to be effective. So even if you're thinking, "Okay, the person's not handling equipment," yeah, they are, in the form of their laptop, my microphone, I have a second screen, all the things. So even during COVID it was making sure that people had strong enough internet and the standing desks so that they're physically not in pain. All we have to do is remove frustrations and that can lead to retention. What a great example. I love that.

Alec Broadfoot: Yeah. That and the frustrations. Just in Toronto a couple of weeks ago we learned about that tool, and my eyes are up. And some employees, they just have this great work ethic and they put up with inconveniences and they don't even know it. And then others are a little bit more sensitive and they're asking for help. Both types of employees need the equipment to do their job right.



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Shannon Waller: Yeah. If you're feeling like you have to constantly work around, you're not actually growing and building. You're just keeping things at maintenance level, and last time I checked we want our companies to grow. So don't make it about the employee, make it about actually people being able to do their jobs well. I think that's absolutely essential. Love it. So what's the next Gallup question that you like to make sure people engage?

Alec Broadfoot: At work I have the opportunity to do what I do best every day, and at Strategic Coach we talk about Unique Ability. I mean, people enjoy their jobs if they're in their Unique Ability, right? If they are doing work that they love and they're great at, so as a company, as employers, we want to make sure we have people on their Unique Ability. If 95% of what they do they hate, they're miserable, they don't want to go back there, there may be a toxic culture, we want to make sure they're doing what they love. And so that's going back to the position profile. When you write a position profile, you want to communicate your culture, what's expected of them, the behavior traits and values, what their job responsibilities are, because you want to attract the right people to your candidate pool and repel the ones that don't fit.

Shannon Waller: Which is true of any good marketing. And I love it because I recorded a podcast a while ago. It's like, "We need to apply the same marketing capabilities and talents that we do to attract customers to attract talent."

Alec Broadfoot: Yes.

Shannon Waller: Same thing, just in a different direction. And I love the intentionality and consciousness with which you bring to it. I'm like, "Oh." I was looking at a job description for a new person yesterday. I'm like, "Oh, do we have behaviors, traits, and talents listed in there? Not clearly enough." Those are the first thing. When you said that, I'm like, "I need to go back to that job description, or a position profile," which is a much better term, to make sure I list that out. Because stuff can get too high level and too general, I don't end up with the human I want. Certain jobs like reception, you're the director of first impressions. We need you to really like people.

Alec Broadfoot: Yes.

Shannon Waller: We've had a few people that clearly did not. What were we thinking? No, they may have great organizational capabilities and talents, but there's a personality aspect to some roles. Not all. Although now I can't think of any that don't. But it's like there's certain things. Sometimes you want people to be quieter, sometimes you want them to be more forthcoming. Completely cool. There's no right or wrong, but there could be a wrong or right fit for the role.

Alec Broadfoot: Yes, for sure, for sure.



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Shannon Waller: Such a good point.

Alec Broadfoot: Yeah. There's a convenience store. We're in Ohio and there's a couple of hundred convenience stores in the area and they use some of the tools that we use, but they were hiring cashiers or the people that take the money, and they found that they didn't want extreme extroverts because they would just talk all day to these candidates and the line would back up. And they didn't want extreme introverts because they didn't say hello or anything like that. So it was really important that they had a balance. And so that's an example right there.

Shannon Waller: I love that. I love that. There's another question that you like, too, from Gallup.

Alec Broadfoot: Yeah, my supervisor or someone at work seems to care about me as a person. And so people don't care how much you know until they know how much they care. The old adage, I think it was Thoreau who said that, and then John Maxwell made it popular. So that is super important, right? Employees don't leave jobs, they leave bosses. So having that care is super important. And so we want the right leaders working for our companies because it's important that they retain the talent that you've worked so hard to bring in and to onboard. So that's an important one.

Shannon Waller: And I've found that there's a couple of aspects to that. One is caring about them just from a human connection point, but then there's also caring about someone's growth and development, because I've seen both of those, and ruinous empathy is where you cared personally, but you don't actually help challenge someone to grow in a good, healthy way. And so I think both of those things. Care about you, care about where you're going, care about your strengths. And as I mentioned to you before, I read a great study and I have to find this article. It's bugging me that I can't. But it was interesting. When people feel known and cared about, they stay. I mean, this is the other thing, the other subtext of our conversation today is retention.

Because finding great people is hard enough but then you can't keep them? Oh, dear, that's expensive, as you mentioned. And it turns out that when people feel a little bit known, so like your process, like our process, we give a lot of profiles and we invest in you before we hire you, which means you know yourself better, but we know you much better. And people, even if we don't end up hiring them, are like, "Wow, that was unexpected. It so clearly says that this is not a transaction, it's a relationship, and that we care. Why do you have so many interview steps?" It's one of the things we get, but we are picky and that says something. That means, "Oh, people automatically up their game." Anyway, going back to this article, it was a call center and they kind of split people and call centers, to my mind, have the most notorious record for churn because they're just like sweatshops kind of thing.

Alec Broadfoot: Yes. Yeah.



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Shannon Waller: So they divide the group. In one group, they just did their normal process. The other one, they may have had some conversation, but what I remember is they gave them a mug with their name on it. They gave them a little bit of swag, a little bit of that care package, and there was at least a T-shirt or a sweatshirt with their name. That one feature changed the retention rate dramatically. So when people felt like they weren't a number but they were actually a human being and someone cared to actually find out the correct spelling of their name and put it on something and give it to them, turns out that was amazing. And I like that example because we're not sweatshops and it's not that kind of work. But when you actually just do the minimum of caring and letting people know that they're appreciated for who they are as an individual, what a difference that can make.

Alec Broadfoot: Yes. I love it.

Shannon Waller: Clearly that has stuck in my head. I will go back and find the article. But I just was really impressed by that. We need to be known. It's a basic human need and we have an incredible opportunity in onboarding to develop that and to nourish it and to expand it, because if you want access to that person's Unique Ability, you have to find out what it is. The profiles are the starting point, but then they obviously need a conversation.

Alec Broadfoot: Yes, it should never stop. So right now I'm taking each of my employees out to lunch. We're doing that on a one-on-one basis and we got to work with schedules and stuff like that, but I just had a great lunch with one of my employees yesterday, and you have to spend some time with them and ask them questions and get to know them and ask them how things are going at home and what they love about their job and where they see themselves in the future. And so, it's time. Time is caring, right? Spending time is showing that you care.

Shannon Waller: I love that. So we talked about what to do in the onboarding process to be successful. So invest time, ask questions, care personally, make sure you hire the right person, which I'm happy we spent some time on. What are some ways that people could mess it up? What should people not do?

Alec Broadfoot: Number one, don't hire the wrong person.

Shannon Waller: Which sounds really obvious, but it's not. Yes?

Alec Broadfoot: Gallup says 82% of the time employers fail to choose the right manager. It's an 18% success rate, so you want to hire the right person. And we started doing this 10 years ago. We were helping companies, and we still do this today, find and hire integrators and COOs and second-in-commands. I'll follow up with them after they're hired 30 days, 180 days. I'm like, "How's it going?" And so early on, we didn't have this as part of our process, and I would hear



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things from the visionaries and owners and I'm like, "Well, I don't really know how they're doing," or, "They're not doing as well as I would like."

And I would say, "Well, have you shared with them how you're going to hold them accountable? What success looks like?" And the response back was, "At this level I shouldn't have to tell them." So that is a myth, right? That is a myth. You can't assume that they know what success looks like. So that's a definition of disaster.

Shannon Waller: Just to add to that, Alec, for a moment, we have lots of awesome thinking tools and one of them is the Strategy Circle. And I always coach people, define what the result looks like. What does it look like when it's done and done well? And that is this applied to someone's success in a role. And it's interesting because we're willing to spend literally six figures and more to do this, and yet we don't often decide on and communicate the desired result that we want, which is kind of a whackadoo when you think about it.

Alec Broadfoot: It is.

Shannon Waller: We just expect it to work, and I thank you for pointing that out, it was a myth, because again, that's much more the transactional side. Your company is unique. How you work is unique. Your culture is unique. You are unique. Why wouldn't what you expect from them also be individualized and unique? So I think if people put it in context that way they can fix what is potentially a big problem.

Alec Broadfoot: Yeah. And also how to mess it up. It's just sending them off. "Here's the Pinsky file, here's your job," or, "Let me show you what you need to do. Okay, you're on your own." You treat them like a number. So that's what not to do. So, effective training, making sure they're successful, everything we've been talking about.

Shannon Waller: Yeah, I think I would add to that, focusing on the negative as opposed to the positive. It doesn't mean that you don't make some course corrections. Oh, you know what this reminds me of? We have something that actually I got from a brilliant company called TWC Financial a kajillion years ago, and it's used with permission. They had worked with a consultant and come up with something called delegation levels, and they had seven. That was a little too complex for my clients, so I shortened it down to four. But one of the things is, and this is actually used in training and onboarding, number one is, go research it and come back to me. Don't do anything. Number two is, do stuff but let me know at each step, at each milestone. Number three is, just let me know when it's done. And number four, just make it go away.

Now, that's my personal favorite, but you have to work up to that. Or if it's brand new to me, you could be normally a level four and everything, but if it's brand new to me, we're both back to level one. And people don't understand this and sometimes their noses get out of joint, which is



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why I explain it. But I think it's a good way to, a level one is, just go do some research, come back, and let's talk about it. And then level two, again, let me know at each step, and that gives you confidence and them confidence. And finally three. And by the way, anything client related never goes past a level three for me. I always want to know what happened. It is never level four. Administration, always level four. People, always maximum level three. So no matter how, you could be brilliant and I still want to know what happened because I'm interested.

That's a sense of progression that probably is really healthy for both people, and I know because I had a new assistant years ago and she was doing my expense report, and I said, "Okay, let me check it over before you send it." She didn't. Sure enough, then I was in the position of having to correct her. It's not what I wanted to be doing. I'm like, "No, no, no, this doesn't go here." And not that I love doing expenses, but I know what works and what doesn't. And so it was like, "Oh, she didn't listen." Anyway, she's no longer in that role. But it's important because that builds confidence for both of you, and I think that could be another success strategy.

Alec Broadfoot: Yes. I mean I think that's a great model. You want to get them to levels three and four. And the way to do that is hire the right people, train them, spend time with them, and then you're going to get the return that you want. You're going to get that freedom of time and be able to pursue other passions.

Shannon Waller: I love it. Alec, this has been so insightful. I love my conversations with you. To me it's like when you hire the right person, how to make sure this is the success formula in terms of what to do, what not to do, and how to think about it. I mean, I love Dan's expression. He said, "The problem is never the problem. The problem is not knowing how to think about the problem." And I think what you've really clearly identified is how to think about the situation. It's not really a problem, but it is a problem if you've invested money in someone and they're not working out, that's an expensive problem.

Alec Broadfoot: That is.

Shannon Waller: So I love the clarity, the direction, the tools, the resources that you've brought to bear in this conversation, and obviously collaboration with Strategic Coach, which is awesome. So if people want to know more, if they want to hire someone and realize that you're the Who, how can people get in touch with you? How can they reach out? What resources are available? All the good things.

Alec Broadfoot: Yeah. So our website has a lot of resources. That's visionsparksearch.com. We have lots of resources on there and articles and tools. If they want to reach out and learn more, or they're having a question about who their next hire is, they can contact us. An email would be discover@visionspark.com, vision-spark.com. There's a dash in between. Yep.



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Shannon Waller: Fantastic. So visionsparksearch.com is your overall?

Alec Broadfoot: Yes. Yes.

Shannon Waller: Wonderful. Woo-hoo. Okay. I'm gonna go check it out right now. I think that'll be fun. So, Alec, any last parting words? Because I know you're passionate about onboarding. We were chatting about it and I'm like, "I have to get you on my podcast to talk more." So thank you for sharing all that you have. Any last thoughts, words of wisdom, words of encouragement that you would give to our audience?

Alec Broadfoot: I would say as entrepreneurs, 90% is WhoNotHow, right? It's such a profound concept and we can grow, we can have more freedom if we have the right people in the right seats. And so it's everything. I see a lot of entrepreneurs struggle because they don't have the right leadership team and they're in pain, and they're trying to do it all, and they've hired the wrong people. So they think, "I got to just spend more time. I gotta do things better." But if you hire the right people and have the right leaders in place, you have an integrator or second-in-command, man, life is better.

Shannon Waller: I love that. Just make sure you onboard them properly. Awesome. Yes.

Alec Broadfoot: Yes.

Shannon Waller: WhoNotHow. It's interesting. It so profoundly shifted people's thinking. It's not just delegation, it's actually, to use the US term, elevation, because that person is so much better. And then you get to have your bigger future, which is so exciting.

Alec Broadfoot: Yes.

Shannon Waller: Alec, I want to end up with a really great quote that happens to be behind your right shoulder. Can you just quote that, because I think it sums up everything that we've been talking about.

Alec Broadfoot: Yes. So this is from a mentor of mine whom I love, but he said, "The best time to fire a marginal performer is during the interview process."

Shannon Waller: I love that. In other words, have standards, pay attention, have a great process, and then take good care of them once you've got them. Well, thank you for your wisdom and making sure that we can both attract and keep the right "Whos" because that's really what onboarding is all about in hiring. So as always, Alec, a total pleasure. Again, thank you for sharing your wisdom and I'm sure we'll be talking again soon.



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Alec Broadfoot: Thank you so much, Shannon.