

# Staffing Your Certification Business Unit

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While it *is* possible to run a successful certification program as a solo entrepreneur, the reality is that growing bigger and earning more money ultimately requires some help.

If you have yet to add staff or have recently concluded that the employees and outsource vendors you have in place now aren't serving your goals for your certification program, it's time to step back and analyze who you need on your team—and it's time to determine what kind of work they should be doing for you.

## Planning for Your Cash-Flow Generating Staff

Apart from your employees or contractors who actually deliver your program(s) and consulting services, your most important staff will be those people who work specifically on projects and tasks that bring in the cash.

While you may not employ a different person for all of these roles in your company (or have individual outsource vendors handling each unique task), be aware that the following tasks should *all* be accounted for in your planning. Together, these job duties make up the “staffing system” that will help you grow your certification business unit on a sustainable basis:

- Inbound Telephone Staff
- Practitioner Support Personnel
- Affiliate Manager
- Online Marketing Manager & Webmaster
- Commissioned Salespeople
- New Business Development Team
- Offline Marketing Manager & Speaker Agent
- Outsource Vendors for Specific Tasks

To reiterate, the above tasks and job duties can be combined into just a handful of people—with one person responsible for two or three job areas, particularly if your business is new or just beginning to expand.

## Inbound Telephone Staff

With expanding technology and AI features, it's possible today to “hire” a sophisticated, voice-activated telephone answering system for less than a live receptionist. RingCentral, for example, even offers AI-based phone agents 24 hours a day, 7 days a week. ([www.ringcentral.com](http://www.ringcentral.com).) These automated systems can make your company look bigger and more established than it actually is (and they're ideal if you work with a remote team).

But eventually, prospective clients and coaching/licensing leads will still want to speak to a real human—regardless of the price of your program. Not only that, but *old-fashioned phone calls* are actually becoming more popular, now that Zoom video calls—though mainstream—require people to be in front a computer for the best experience.

So, what can you do?

## Inbound Technology That Works for Certification Programs

In our experience, if you are a solo entrepreneur or employ only remote staff, here's a tech stack that works well for certification programs:

1. Online sales letter or webinar sells your program



2. Call-to -Action (CTA) asks prospects to complete brief questionnaire, provide name/email/mobile phone, and we'll contact you to discuss the program.



3. Very short form embedded in sales letter provides fields for name, email and mobile number. Clicking "Submit" on this short form takes prospect to the questionnaire (5-12 questions).



4. Completing questionnaire and clicking "Submit" sends prospect's contact information and questionnaire answers to your CRM, which triggers confirmation email and text (SMS).



5. Completing questionnaire and clicking "Submit" also sends the prospect to Calendly (or other online scheduler) to book a discovery call with you. Telephone calls (not Zoom) are recommended to discuss your program, since many people will not be in front of a screen at the time of scheduled call and are more likely to be a no-show.

**Abandoned Questionnaires:** If a prospect completes the short form embedded in your online sales letter, but does not complete the longer questionnaire or book a discovery call, you should pre-program into your CRM an email drip sequence that is triggered to nurture the prospect and reinterest them in booking a call with you.

**No-Shows for Discovery Call:** Similarly, if a prospect does not answer your telephone call at the appointed time, you should pre-program into your CRM an email drip sequence that you can manually trigger to nurture the prospect and reinterest them in booking a call with you. Many people are embarrassed when they miss a call and will not readily reschedule. However, a friendly email sequence will not only convince them of the benefits of speaking with you, but will also communicate your genuine interest in learning more about them.

**Pre-screening by an assistant:** If you have the ability to hire a virtual assistant to pre-screen calls and gather the information in the questionnaire, this is an excellent "high-touch" beginning to the prospect's experience with you. The screener can pre-qualify prospects based on your criteria, or simply book a discovery call for everyone who responds.

Of course, if you do have staff onsite at your business to answer the phone, so much the better—as long as they are trained to begin the "sales" process and help convert inquiries to sales. Since your receptionist or phone-answering staff truly is your first point of contact, they become—by default—your first opportunity to generate cash-flow.

That's why you must approach this job position with making money in mind.

## Finding Good Phone-Answering Staff

In any well-run small business, superior telephone answering staff just seem to know everything that's going on—from current promotions...to who does what job...to up-to-the-minute information on products and services...and more.

There's no worse experience for a customer or prospect than to reach your receptionist, only to find out the customer knows more about your products, services or promotions than the person answering the phone.

For this reason, hiring superb telephone answering staff—then training them properly—is crucial. But instead of running an ad that looks like every other Receptionist ad, write it in such a way that top candidates will be excited to come to work for *you* versus other advertisers. Better yet, run a small ad with one or two enticing phrases, then direct jobseekers to a voice mail recording or video at your website that better explains the job, your company and why it's such a pleasure to work there. By using this technique, you'll get top candidates willing to work for the pay you're offering—regardless of whether they might be able to make more money elsewhere. Additionally, determine the non-monetary advantages of working at your business and use them to draw top candidates. For example, do you offer:

- Flex-time which appeals to students and working mothers?
- Rapid promotion into other jobs in the company or capabilities within your industry?
- A fun work environment or creative atmosphere?
- Unique training that candidates can't get anywhere else?
- Exciting projects or the ability to interface with interesting people?
- More paid vacation time or personal time than other companies?
- A way for front-office employees to earn money above and beyond their normal pay (such as commissions for order-taking or save-the-sale calls)?

## Interviewing Phone-Answering Staff

After jobseekers contact you about the Receptionist position, you'll need to interview them—first by phone, then in person for final candidates (if hiring locally). But before planning your interviews, ask yourself, *What qualities do I think of when I encounter a really good telephone person?* Articulate, quick-thinking, personable and knowledgeable are some words that come to mind. When a job candidate answers your ad, these are the qualities you should look for immediately—in addition to any other work experience you're looking for.

One way to find out how articulate a candidate is...how well they use good grammar... whether or not they'll represent you well and so on, is to simply get them talking about *anything*—an item on their resume, their past work history or their hobbies. Also, ask open-ended questions directly related to the job such as, "What would you do if a caller wanted...?" to find out whether they will think quickly and go the extra mile to help a caller.

## Planning Your Interview Questions

To plan for the interview process, write below the questions you want to ask. Then, add any questions that will help you determine the attitude, work ethic and service-mindedness of your future receptionist:

Work Experience \_\_\_\_\_  
\_\_\_\_\_

Specific Skills \_\_\_\_\_  
\_\_\_\_\_

Natural Sales Ability/Customer Service/Order Taking Experience \_\_\_\_\_  
\_\_\_\_\_

Availability/Hours/Days \_\_\_\_\_  
\_\_\_\_\_

Knowledge of Your Industry \_\_\_\_\_  
\_\_\_\_\_

Knowledge of Your Type of Product or Service \_\_\_\_\_  
\_\_\_\_\_

Attitude/Work Ethic \_\_\_\_\_  
\_\_\_\_\_

## Hiring and Negotiating Pay

When you find a candidate who has the right personality, work ethic and skills you desire, you'll want to make them a job offer quickly. In some job markets, even a day's delay could mean your final candidate will be hired by someone else.

Additionally, you'll want to negotiate pay that makes sense for your market, but you might also negotiate additional incentive-based pay if your receptionist will be taking orders, upselling, performing customer service or doing "save-the-sale" calls.

A small sales commission or percentage of the sale is appropriate depending on your certification program and how much the receptionist actually contributes to the sale—as is a flat fee per item sold.

## Defining Phone-Answering Job Duties

There is more to a receptionist's job than just answering the phone. Perhaps you need them to perform administrative functions, book your appointments, provide minor customer service duties and more. Take time now to decide what those job duties will be in addition to answering the phone:

Hours Needed: \_\_\_\_\_ am / \_\_\_\_\_ pm Days Needed: Su Mo Tu We Th Fr Sa

Administrative Duties (if any): \_\_\_\_\_

\_\_\_\_\_

Customer Service (if any): \_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

Personal Assistant Duties (if any): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

Order-Taking / Sales / Save-the-Sale / Inquiry Conversion (if any): \_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

## Commissioned Salespeople

If you don't employ commissioned salespeople now . . . if you don't have a formal sales function of any kind . . . or if you are performing the sales function yourself, realize that your entire company will undergo an amazing transformation once you bring a professional salesperson or sales team on board.

Suddenly, your time will be free to focus on building the business, instead of making sales. You can begin to control your own daily schedule—planning dedicated focus time for critical projects, rather than being constantly interrupted by prospective new clients who must be dealt

with whenever they call. You can focus on generating thousands of leads for your salespeople to follow up with—instead of asking your people to spend valuable time generating their own.

In short, everything changes when you bring on board a professional sales staff. But how does one go about it assembling the right team? I always like to ask critical questions of the business owner before starting the hiring process.

### Are You Ready for a Commissioned Salesperson?

Do you want in-house salespeople or do you prefer to outsource the sales function for your company altogether?

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Will the salespeople need to generate their own leads or do you? Will you compensate your salespeople differently if they generate the lead?

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Could their time be better spent selling while some other method is used to generate leads?

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Are your anticipated commissions in line with your industry? Is it possible to raise your prices and pay your salespeople more, or simply change the certification program's cost structure to a price that would create more sales (so they earn more on volume)?

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Have you tested different sales scripts for any licensing or certification program in the past? Was there a noticeable gain from one script versus the other? Have you ever reviewed and made changes to the sales "pitches" or scripts you use?

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- Have you ever written a script for your receptionist to handle inquiries when you are not available—especially inquiries generated from advertisements?

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- Have you created a sales reference book or “cheat sheet” for your own use when doing telephone sales? Does this book include proven sales scripts? Does it have answers to all possible objections that might come from prospective customers?

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- If you don’t have salespeople of any kind, do you conduct sales for your company? Or do you have non-traditional outlets or non-traditional “salespeople” who are talking to potential customers for you (such as affiliates or other professionals who refer to you)?

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- Would it be possible to expand your geographic market if you had salespeople to work those new territories for you?

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- Do you have purchasing functions for your certification program at your website?

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- How would you distribute leads if you were managing multiple salespeople? (Some CRM’s have “round robin” distribution of leads.)

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- If you are selling a certification program now, have you ever shadowed your best employee (or yourself) to find out why they are so successful at making sales for you? Have you ever “systematized” his/her methods (including your own, if you are doing the sales now) and created a procedure guide for future salespeople to follow? Have you ever conducted a brief training for others in your company on how to sell? Have you recorded successful telephone pitches or sales pitches, if permitted by law, and used them for training purposes?
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Until you answer these questions for yourself, the process of finding a good salesperson will be imprecise at best.

### Finding Good Commissioned Salespeople

Good salespeople are easy to find. Sales superstars are not so easy to find.

Who are sales superstars? Those top 5% of sales professionals who generate about 70% to 90% of all sales. In order to grow your certification business and meet your financial goals, you want these superstars working for you. And in order to successfully hire them, you must prove that your business makes it easy and profitable to makes sales.

There are two ways to acquire sales superstars for your company: (1) Hire a sales professional, then train them on the benefits of your methodology and certification program, or (2) Hire someone familiar with your methodology and train them to do sales of your certification program. Either method works well. In fact, sometimes the best salespeople are people who have never considered a career in sales, but are so enthusiastic about your work, they continually “sell” for you without being in a sales position with your company. Perhaps they have a natural gift of gab, are natural-born communicators who like to educate others on the benefits of your methodology—or maybe they simply have the ability to listen to the prospect’s needs and instantly give a response that shows how your methodology and certification program can meet that need. That’s natural sales ability that can be developed with the help of a few tools, scripts, and closing techniques.

To find sales superstars, you can advertise on the major jobseeker websites—in fact, these online job sites are ideal if your sales are done by telephone only. That means your sales superstars can live and work anywhere, rather than reporting to your office or geographic territory every day for local in-person sales calls. This lets you draw from a much larger talent pool.

In the same way you would look for a superstar receptionist, you can write your job description in such a way that top candidates will be excited to come to work for *you*. Don’t just explain the job, but talk about your company and why it’s such a pleasure to work there. With sales jobs in particular, talk about the superior marketing you’re doing that drives pre-sold leads to the sales floor—making it easier than ever to close sales and make above-average commissions. Describe your company as a marketing-savvy, sales-oriented business. Talk about the superb training you provide. By using this technique, you’ll get top candidates willing to

work for the pay you're offering—regardless of whether they might be able to make more money elsewhere. Also determine the non-monetary advantages of working at your business and use them to draw top candidates.

In addition to job postings, look for people who are circulating in your universe right now. They've used your methodology. They're enthusiastic about you and your business. They may not be an experienced salesperson, but they have a natural aptitude, friendliness, rapport with people, passion for the industry, and so on. With a little training, they could become a sales superstar.

One final (and somewhat sneaky) way to recruit sales professionals is to simply recruit them away from the jobs they have now. This is done every day. In fact, so many salespeople become disillusioned with their employer, you'd be surprised how successful you can be in convincing them to leave their job to work for you.

One woman I knew who sold personal improvement services recruited attractive young saleswomen for her business from the cosmetic counters at upscale department stores. She knew they received frequent and comprehensive sales training as sales reps for the big name designers and cosmetic companies. All she had to do was recruit them and teach them to sell her services instead.

Another business owner I know of appraised the salespeople who came to sell *him* goods and services, then pitched the more talented ones on joining his sales force—particularly if he suspected they were not earning the substantial income he knew his commission structure could pay them.

## Interviewing Commissioned Salespeople

Great salespeople are more entrepreneurs than employees. They just think differently. And during the interview process, you want to ascertain whether they have the same level of ambition you do as a business owner.

If you've done sales for your own small business or managed your sales organization for any length of time, you already know the traits, skills and sensibilities that are required to sell your methodology or services. Why not turn that knowledge into a process for identifying and recruiting people who can be trained to sell for you?

Simply create a checklist of the traits you're looking for and use it during the interview process. Have the candidate answer questions related to those traits.

If they look promising, send them home with a copy of your sales script (more about this later) to study. Schedule a time when they can call you (or your sales manager, if you have one) to role-play—*as if they are conducting a sales call using your script*. They won't be that well rehearsed, of course. But you'll be able to tell whether they have what it takes to sell for you. See whether they have potential before *you* invest the time and resources to train them.

Remember, too, that good salespeople are entrepreneurs just like you. If your sales professionals work on any type of commission, they are, in effect, working for themselves. Like you and your business, their income is directly related to their efforts and ability to find new ways to sell more certifications and services in less time.

If you can add “*thinks like an entrepreneur*” to your list of criteria to look for in a candidate, it will make your job of recruiting salespeople much easier.

One way to determine if an applicant has this tendency toward self-motivation is to find out whether they’ve invested in their own knowledge and training, outside of what was provided by their previous employer. Have they taken sales training on their own? Do they listen to motivational or sales strategy training in their car? Do they passionately pursue sales excellence by reading books on the subject? If they’ve never been in sales before, do they at least search out new ways to make money or expand non-sales projects they’ve been involved in?

Just like you pursue your own business with a passion, entrepreneurial salespeople pursue sales strategies and tactics with a passion. They constantly improve their abilities in their spare time.

## Hiring and Negotiating Commissions

If you decide to hire a specific candidate, offer a 30-day trial period. While many sales organizations follow this practice, most tend to focus on scrutinizing the new recruit’s performance, rather than on supporting, growing and training the new salesperson during this time. Make it clear that you have a very specific sales culture in your company and expect to work together over the next 30 days to evolve them into a sales superstar. You expect to deliver certain things to them—training, support tools, motivational resources, qualified leads, and so on. (This announcement alone can have a huge impact during the interview process.) You want them to be motivated and to “take ownership” of their job and your services. But if they find they can’t work within this supportive, exacting culture, it won’t be a good fit in the long run—for either of you.

Once you find a top candidate (or more than one), it’s time to negotiate their pay, their commissions, their bonuses and other benefits.

One thing that may surprise you: it *is possible* to hire salespeople on straight commission—that is, paying a commission only when a successful sale is completed and the prospect’s money is in your bank account. I’ve hired salespeople on that basis for years.

The secret is to pay them above average commissions for generating sales versus paying them a base salary per month with lower commission percentages. In general, for sales of most high-ticket certification programs, commissions of about 7% to 20% of the gross sale amount are standard. I prefer to pay on the actual sales amount versus a percentage of profits, net revenue or gross margin—and my salespeople prefer this, too. It’s easy to calculate, they know what their pay will be at any point in time and it avoids delays, uncertainty and misunderstandings that might occur if I had to first calculate profits or margins before paying out commissions. It also puts the responsibility on me as the business owner to control my costs so both I and the salesperson make money.

## Defining Job Duties and Establishing Sales Goals

Top sales superstars are goal-oriented. As long as you are providing a steady stream of qualified leads through your good marketing and prospecting techniques, your sales team should have no problem converting these leads into enthusiastic buyers and satisfied long-term customers.

To establish sales goals that are fair and realistic, look to your own closing rate as the benchmark. Since you are often the best person to convince prospects to buy, assume that a top salesperson will be able to make slightly fewer sales than you would. If you close 22% of prospects into your certification program, for example, use that as a benchmark for your new sales team.

What sales goals will you establish for your new salespeople? Use the chart on the next page to help you decide.

Sales Goals	Your Own Track Record	Goal for Salesperson
Leads Generated Per Week (if required)	_____	_____
Number of Leads Contacted Per Week	_____	_____
Conversion Rate	_____ %	_____ %
Average Sale or Contract Amount	\$ _____	\$ _____
Average Upsell Amount	\$ _____	\$ _____
Refund Rate (Percent of Sales Refunded)	_____ %	_____ %
Lifetime Value of Customer (Total Patronage)	\$ _____	\$ _____
Customer Service/Save-the-Sale Calls Per Week	_____	_____

Additionally, be sure to define the salesperson’s job duties going forward. The biggest question by far is whether you’ll require your salespeople to handle customer service related to the sales they make. Requiring them to be the one and only point of contact helps increase sales and customer satisfaction, but it reduces the amount of time they have to follow up on leads. It’s your decision: I’ve utilized both situations . . . that is, salespeople doing customer service and a separate staff providing customer service.

Additionally, you’ll need to decide whether you want your sales professionals to generate their own leads (prospective customers). Many companies require this of their salespeople, but I’ve always preferred to control the quality and frequency of lead-generation programs, letting my salespeople follow up on the quality leads that my good marketing generates.

Use the chart on the next page to help you plan duties for your sales professionals. These are some typical sales functions, but you may have others in mind. Jot down yours in the blanks provided.

## Planning Duties for Your Salespeople

	Required	Not	If Not, Who Will Do This?
Generate his/her own sales leads (prospective customers)	<input type="checkbox"/>	<input type="checkbox"/>	_____
Receive inbound product or service inquiry calls	<input type="checkbox"/>	<input type="checkbox"/>	_____
Handle refund requests/"save-the-sale" calls	<input type="checkbox"/>	<input type="checkbox"/>	_____
Make outbound telesales calls to targeted lists (cold calling)	<input type="checkbox"/>	<input type="checkbox"/>	_____
Conduct in-person sales calls and visits	<input type="checkbox"/>	<input type="checkbox"/>	_____
Follow up on inquiries by telephone	<input type="checkbox"/>	<input type="checkbox"/>	_____
Email or ship product literature or samples	<input type="checkbox"/>	<input type="checkbox"/>	_____
Provide customer service to buyers he/she sells to	<input type="checkbox"/>	<input type="checkbox"/>	_____
Provide own sales support staff (including paying for own staff)	<input type="checkbox"/>	<input type="checkbox"/>	_____
Attend trade shows and industry conferences	<input type="checkbox"/>	<input type="checkbox"/>	_____
Speak at industry events in order to generate leads	<input type="checkbox"/>	<input type="checkbox"/>	_____
Conduct preview workshops locally	<input type="checkbox"/>	<input type="checkbox"/>	_____
Call existing customers to upsell, resell or cross-sell	<input type="checkbox"/>	<input type="checkbox"/>	_____
Manage sales lead database and/or conduct CRM*	<input type="checkbox"/>	<input type="checkbox"/>	_____
Develop product literature or sampler packages	<input type="checkbox"/>	<input type="checkbox"/>	_____
Develop proposals or write contracts from a template	<input type="checkbox"/>	<input type="checkbox"/>	_____
Write up estimates	<input type="checkbox"/>	<input type="checkbox"/>	_____
Develop pricing policies/discounting policies	<input type="checkbox"/>	<input type="checkbox"/>	_____
Run sales reports	<input type="checkbox"/>	<input type="checkbox"/>	_____
Write sales scripts	<input type="checkbox"/>	<input type="checkbox"/>	_____

(continued next page...)

	Required	Not	If Not, Who Will Do This?
Manage other salespeople	<input type="checkbox"/>	<input type="checkbox"/>	_____
Recruit new salespeople	<input type="checkbox"/>	<input type="checkbox"/>	_____
Train new salespeople	<input type="checkbox"/>	<input type="checkbox"/>	_____
Attend in-house sales meetings/in-house trainings	<input type="checkbox"/>	<input type="checkbox"/>	_____
Attend outside sales trainings (requiring travel)	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

\* CRM is "customer relationship management," typically via ongoing email, telemarketing and direct mail.

## Practitioner Support Personnel

Until you begin making frequent and abundant sales, support people are unnecessary. In fact, some experts say that, until you start selling a steady 15-20 certification programs a week, you should do all Practitioner Support of your growing network yourself in order to establish a knowledge bank of frequently asked questions, learn about issues that need to be answered with established policies, develop follow up procedures that help with post-purchase reassurance, and uncover other valuable information about coach and practitioner needs.

Once you begin making more frequent sales, however, it's time to free yourself from this task and begin to work on the business—not in it. At this point, practitioner support personnel will become a vital addition to your cash-flow generating staff—and, in fact, can greatly affect how successfully you retain practitioners in your network and continue to sell them more services.

### Finding Good Practitioner Support Staff

Good practitioner support staff go the extra mile to help practitioners remain satisfied after their purchase—but they also work under established procedures so that all practitioners are dealt with in the same professional, helpful manner. No single practitioner should be treated any better (or worse) than any other practitioner simply because they scream louder, threaten, flatter the practitioner support team, smooth-talk, manipulate, and so on.

Additionally, a good practitioner-support representative does not provide company-confidential or other information that a practitioner can “latch onto” in order to gain special treatment or concessions.

So where can you find highly skilled practitioner-support professionals?

If you’ve read above about how to hire a salesperson and inbound telephone person, you know that you can advertise locally, find people already circulating in your universe or outsource this function. You also know that you should advertise the non-salary benefits of working for your company along with the financial aspects. Additionally, if you pay bonuses to practitioner-support representatives for sales made or refunds reversed, you should mention that in your advertising.

One way to handle this function when you are still a small company is to hire a virtual assistant (VA) to handle customer service by phone. This way, you can draw from a larger talent pool (the World) and have your VA receive calls dialed to your practitioner-support line. They’ll only charge you for hours (or minutes) actually spent providing practitioner support on your behalf. And most all practitioner-support functions are provided by telephone, email or Zoom anyway. (More about outsourcing—including to virtual assistants—later in this chapter.)

## Interviewing Practitioner Support Staff

Like good inbound phone staff, practitioner-support personnel are also articulate, quick-thinking, personable and knowledgeable. They have the ability to learn and understand your methodology and services—backwards and forwards—and can help the practitioner with questions about usage, content, and so on. But most importantly from a sales standpoint, they have the ability to guide a satisfied practitioner to the next most logical purchase or upgrade in their training journey. Because they are often the first point of contact after the sale, practitioner-support personnel can usually upsell practitioners more often than even a trained salesperson who does not have this level of first-hand contact with the coach or practitioner. By default, a good practitioner-support staffer becomes sort of “junior” salesperson.

For these reasons, your interview questions should focus on determining their level of knowledge, work ethic, attitude, helpfulness, verbal communication, natural sales ability and other qualities. If your certification program is a high-ticket purchase, you need someone who uses good grammar, thinks on their feet, and understands the needs and wishes of affluent buyers. Virtually no amount of training can change bad grammar or articulation, poor listening skills, unhelpfulness, or the inability to grasp how people use your methodology and services.

## Planning Your Practitioner-Support Interview Questions

To plan for the interview process, write below the questions you want to ask. Then, add any questions that will help you determine the attitude, work ethic and service-mindedness of your future practitioner-support person. Use your own experience in conducting initial coach or practitioner support for your certification program to create what-if questions that cause the candidate to think about what they would do in certain situations. Jot down your questions on the next page.

## Planning Your Customer-Service Interview Questions

Work Experience Desired

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Specific Skills Desired

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Natural Sales Ability/Customer Service/Order-Taking Experience \_\_\_\_\_

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Availability/Hours/Days \_\_\_\_\_

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Knowledge of Your Industry \_\_\_\_\_

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Knowledge of Your Type of Product or Service \_\_\_\_\_

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Attitude/Work Ethic \_\_\_\_\_

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## Hiring and Negotiating Pay

For some reason, most companies pay their customer service representatives little more than minimum wage. I think this is a mistake, particularly since they'll be "selling" for you and maintaining your all-important coach and practitioner relationships.

One way to cut down on weekly costs but still hire top candidates is to:

- Hire an assistant who provides part-time services for you along with performing duties for other clients like you. That way, you only pay *only for the actual time they work on your behalf*—not for the time they sit at a desk in your office waiting for emails or the phone to ring. These individuals can be found as virtual assistants, internationally based help desks and technical support departments, and fulfillment centers.

- Pay your full-time practitioner-support representative a lower hourly wage, but pay them bonuses for accomplishing special functions such as order taking, upselling, save-the-sale and more. This way they have a huge incentive to focus on bringing in the cash for you.
- Have your practitioner-support representative handle other duties such as part-time marketing projects management, Internet promotions help, media assistance or other cash-generating staff activity in order to justify the full-time wages you pay.

### Defining Customer-Service Job Duties

Before you advertise the position or hire a practitioner-support representative, be sure to determine what support services you want them to do for you—including any other duties if you will be combining multiple jobs into one person. The list below will help you get started listing practitioner-support job duties.

- Answer and respond to email inquiries from coaches or practitioners
- Answer and respond to (or forward to sales) email inquiries generated at your website
- Answer the telephone at your company (if you are not hiring an inbound phone answering person)
- Take orders of post-certification merchandise and upsell buyers into additional services
- Coordinate and check on shipments with an outside fulfillment center or your warehouse
- Research order status and shipping issues
- Provide product or service information for post-certification merchandise
- Forward unanswerable questions to the business owner or other department; track reply and report back to customer
- Help write FAQ (frequently asked questions) scripts so that common questions are answered appropriately and reliably
- Help determine policies and procedures for handling coach or practitioner inquiries

What else do you need a customer service person to do for you?

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## New-Business Development Team

Every business owner wishes they could clone themselves, so they can simultaneously focus on bringing in new business, developing new products and services, and finding new ways to streamline and more effectively run the company. No one person can do all these things. But you *can* hire professionals to act in your stead. And your most important “stand-in” professional will be your New Business Development Manager and his or her team (if more are needed).

Your new business development team will initiate—then manage—relationships with outside parties who can drive buyers to you or otherwise help your revenues grow. This will be particularly important as your certification program and brand recognition grows your company and career through:

- Premium consulting for key clients
- High-profile speaking engagements
- International licensing or sales of foreign-language partnerships
- Embedded programming and train-the-trainer contracts with major corporations
- Co-branding options with other industry leaders
- Future ventures that turn your methodology into books, courses, or memberships
- Retail distribution of your content or merchandise
- Media deals, radio or television, spokesperson contracts, or corporate sponsorships
- Live in-person events, televised events, and livestream events
- The sale of your certification program to an industry leader or investor consortium

Your New Business Development Manager (or team) can find new markets, create new product offers or recommend new service offerings, do market research, represent you in the field, recruit bigger joint-venture partners than you would be comfortable pursuing, create important strategic alliances . . . the tasks are endless. They are not salespeople per se, but rather, they develop entirely new revenue streams for the business.

As an example, in the early days of my company, my new business development people:

- Recommended new consulting packages that added \$40,000 per month in revenues
- Coordinated with seminar promoters to add new speaking opportunities
- Developed a program to recruit Internet affiliates
- Helped initiate a new website to more effectively sell established product lines
- Researched industry conferences where I could meet large-scale direct-response marketing companies interested in my products
- Initiated relationships that later turned into a major distribution opportunity in Asia, as well as foreign-language partnerships in French, Spanish and Portuguese.



## Defining Goals and Benchmarks

Just like the sales professionals discussed above, new-business development professionals should be required to meet sales goals and other benchmarks—just to make sure your money is being spent wisely and that they don’t indiscriminately burn through your joint-venture leads and other opportunities without securing deals. To prevent this outcome, you should tie at least part (if not all) of their compensation to whether or not they meet these benchmarks. (See *Hiring and Negotiating Pay* below.)

What goals do you have in mind for this position? Is it a minimum amount of new revenue per quarter? What about a minimum number of opportunities in process? Could you set goals for new business centers developed such as a new website operating or outside fulfillment secured by certain dates? Will you require them to secure a minimum number of new Internet affiliates or distributors for your services? Use the chart below as an example to help you set realistic benchmarks:

	Current Number	Goal Is to Add...	By When?
Internet affiliates promoting entry-level product	_____	_____	_____
Revenue per quarter from maintenance contracts	_____	_____	_____
Distributors of methodology in North America	_____	_____	_____
Distributors of methodology worldwide	_____	_____	_____
Joint-venture partners endorsing your services	_____	_____	_____
Speaking opportunities at trade conferences	_____	_____	_____
Non-traditional salespeople generating leads	_____	_____	_____
CPA* affiliate networks promoting products	_____	_____	_____
Newspapers running CEO’s syndicated column	_____	_____	_____

\* CPA stands for Cost Per Acquisition. A single CPA network will recruit tens of thousands of website owners (affiliates), then configure your promotion to run at their websites. The CPA network tracks sales and pays affiliates a commission for each sale. For a list of top CPA Networks, visit: <https://mthink.com/all-networks/best-cpa-networks/>

## Finding New-Business Development Professionals

Where should you start looking to find the most important job in your company (next to your own)? Right in your own sales department. Often, the best new-business development managers are competent salespeople you promote into the New Business Development Manager position. In fact, this is an easy promotion to make since your salesperson is already familiar with you, your company, your methodology and services, your promotional capabilities, what’s missing from your marketing and advertising competencies, where you would like to grow, and other details.

You can also seek out consultants who might consider doing new-business development on a part-time basis—until you secure enough frequent and exciting deals to keep them occupied full time. I know of one company who recruited a top-notch advertising and distribution veteran who had already worked on \$500 million businesses. They convinced him to work for their

company two days a week, until soon he was landing major licensing and distribution deals and decided to increase his involvement to a full-time position. By then, it was worth it to both him *and* the company.

In the process of finding a new-business development manager, I wrote a job description to define what the company was looking for. Then I emailed it to anyone who might know someone who fit—*and* who might be looking to make a career move. Here's what I wrote:

International Publishing and Training Company Seeks Vice-President/Publisher

International publishing company selling knowledge products and training services to the small-business category is currently seeking a Vice-President and Publisher to launch North American and international marketing initiatives and negotiate distribution deals for its newest line of branded products.

The ideal candidate will possess experience in developing and marketing publications, training programs and knowledge products. In addition, he/she will possess extensive ability to research, initiate, develop, negotiate and manage strategic alliances for distribution of products and training services in key markets worldwide.

Specifically, the ideal candidate will have prior experience or familiarity with:

- Direct-response marketing of knowledge products, including experience with DR media in the U.S. and with business-to-business campaigns, specifically
- Management of inbound sales leads from conversion/customer care to long-term relationships
- Creation or management of international distribution and licensing opportunities for U.S. authors, including some knowledge of key distributors and promoters in North America, Asia-Pacific, India, U.K. and Europe
- Initiation and management of media coverage across print, broadcast, and Internet outlets
- Management of outsource vendors including inbound call centers, website developers and webmasters, SEO and online marketing specialists, customer service teams, product duplication and fulfillment centers, shopping cart and payment systems, online affiliate managers, CPA affiliate networks, speakers bureaus, copywriters and researchers, and other vendors

Aggressive compensation package for top candidate. Some international travel expected. Virtual work environment; no relocation required. Please email resumé with cover letter to \_\_\_\_\_.

## Interviewing New-Business Development Candidates

Because any New Business Development professional's main role is to initiate, negotiate and manage strategic alliances and revenue-expansion opportunities for you, your focus during the interview process should be to ascertain the top candidate's abilities in these three key areas.

- *Initiating Relationships:* What experience does your top candidate have in finding opportunities and initiating discussions with potential alliance partners? How many deals did they do (or what was the total business growth generated) for their former employer(s)? In what time frame did that new business come to fruition? What initial ideas do they have for your company now that they've had a chance to check out your business and industry prior to the interview?
- *Negotiating Deals:* How do they approach negotiating any deal? What do they feel are key factors in creating a win-win arrangement? Do they have any absolutes they look for in any deal? Who helped them establish deal points and contract terms at their past employment?
- *Managing Alliances:* How many strategic alliances have they managed in the past—at one time? What size staff did they have when they managed those alliances? Did they also

delegate duties to other departments of their past employer’s company? How did they execute that delegation? What were the results of working across departments? Have they ever managed multiple outsource vendors and independent contractors for a small company?

Aside from a demonstrable ability to initiate, negotiate and manage strategic alliances and expansion projects, your top candidate should absolutely have experience or at least familiarity with your industry and geographic market. Either they know which kinds of deals and projects to pursue for you—or they don’t.

### Planning Your Interview Questions

Your business is unique. And the factors that are important to you in making deals will vary greatly from other businesses—even from other businesses in your same industry. That’s why it’s important to formulate your unique interview questions before you sit down with your final candidates.

Once you formulate your list of questions, I recommend you conduct an initial telephone interview—particularly if you’ve identified more than 5 or 6 top candidates. I’ve talked to new-business development candidates who had spectacular resumes—only to determine after 10 minutes on the telephone that I wouldn’t want them representing my company. Save yourself some time and conduct initial interviews by phone. What kinds of questions should you ask? Use the guidelines below to create your own interview script:

*Discuss their work history.* What do they feel were their most important accomplishments at past jobs? What were the concrete results of their efforts at past jobs? How long did those results take to bring to fruition? What was already in place at their employer’s company that made those results possible? Have they ever worked for an emerging company or start-up with no existing business development assets in place?

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*Discuss their knowledge of your industry.* Have they worked in your industry before? What do they feel are the unique challenges of developing new business in your industry? Are there unique benefits to your type of business that make revenue growth easier or more certain? Are they familiar with the growth patterns of your type of business? Do they already have contacts in your industry they might leverage to immediately develop new business for you? Have they researched your industry prior to this interview and do they have any thoughts about where they would start in developing new business for your company?

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*Discuss their business philosophies.* What are the best kinds of strategic alliances in their opinion? What are some deal terms they consider either essential or absolute deal-breakers? Do they have familiarity with contract negotiations and review? What are some deals they've made that unraveled and what would they have done differently if they could do it all over again?

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*Discuss their availability.* What kind of schedule, arrangement, employment, engagement or contract are they looking for in a new position? Will they have to relocate? Will anything impede their ability to travel, if necessary? How much compensation do they need to meet their monthly expenses and how much could be received as profit-sharing from deals they put together? What was their compensation formula at their past employers? Are they seeking other benefits such as equity (part ownership) in the company, insurance benefits, a relocation package, stock options, and so on? When would they be available to start?

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## Hiring and Negotiating New-Business Development Compensation

Like all good salespeople, new-business development professionals who are confident in their own capabilities are usually open to being paid on commission for any new deals they bring you. Whether you're able to hire them on a straight-commission basis—or must pay them a small monthly retainer plus commission—really depends on: (1) their confidence in your business' ability to attract and secure deals, and (2) their own personal finances and monthly cost of living.

With new business development professionals, I find that their monthly pay, commissions, bonuses and other compensation is limited only by your own imagination and creativity. Anything goes as long as it's fair and equitable to both of you.

That said, some guidelines are in order.

For instance, I know of a company that pays their New Business Development professional a \$6,000 per month retainer plus a commission of 20% on any new deals the professional brings in. Obviously, he is motivated to seek out the most lucrative and trouble-free deals possible. Deals that can quickly be brought to fruition allow your new-business development manager to move on to other equally lucrative deals. In another instance, I know of a company that has secured a decent entry-level new business manager on straight commission. If deals are not

secured, the manager earns nothing. While straight-commission compensation is best for a growing business, you really have to balance all factors—including whether you can get the top-quality person you're looking for.

Other factors that must be considered when discussing compensation are:

- Will there be support staff and, if so, who pays those costs?
- Who pays the expenses of finalizing deals—including legal fees, start-up charges, etc.?
- Who pays travel to meet with potential alliance partners (if needed)?
- If the new business development manager is an outside consultant, are there any extra costs that must be met?
- Who will own the copyright in any written proposals, workshop scripts, marketing materials, webpages or other intellectual properties the new-business development manager produces? Can you have them sign a work-for-hire agreement that reserves these rights for you and your company?

Before advertising for a new-business development professional, be sure to determine what you want accomplished—*but also what you can afford to pay for someone to accomplish it*. Again, anything goes as long as the two of you agree to the compensation arrangement.

## Your Deal-Making Grid

One tool that will help you and your New Business Development manager minimize the constant (and tiring) *How much do I get paid for doing XYZ?* conversations is to develop and occasionally update a deal-making grid that shows what types of deals he or she is allowed to make without your direct input, what terms you will accept in typical deals (without checking with you), what you require of the other party in any deal, and—most importantly—how much your New Business Development Manager will be paid for each type of deal.

Not only will the Deal-Making Grid prevent misunderstandings about payment of commissions, it will act as a motivational tool, too, by showing your New Business Development Manager which types of deals pay the most, are most important to you—and are therefore most logical for the Manager to spend time on.

Take a look at the sample Deal-Making Grid on the next page. Then consider making your own grid for your New Business Development Manager and those of your other cash-generation staff who are paid commissions for results.

# Sample Deal-Making Grid

Type of Deal	Free Giveaway	Speaking Engagement	One-Day Workshop	Ebook Offer	6-CD Audio Program	Flagship Multi-Media Product	Teleseminar
<b>Sample Situations</b>	Amazon strategy; newsletter/blurb with freebie; link trade at heavily trafficked site; giveaways to other people's customers	Network marketing events; corporate groups; entrepreneurial groups; marketing conferences; trade association meetings	Workshops attached to conferences, seminars and trade shows; public seminars; sponsored seminars; all require that some other group or person fill the seats	Eblasts; links from other people's websites	Direct-mail campaigns; e-blast campaigns; BOR sales by other speakers; bundling and bonusing	Direct-mail campaigns; e-blast campaigns; BOR sales by other speakers; bundling and bonusing	Expert as guest for other people's coaching programs; random teleseminar; Expert as monthly meet-the-experts CD; Expert as bonus
<b>Does It Require Expert's Time?</b>	No	Yes	Yes	No	No	No	Yes
<b>Product Sold</b>	Free report series; 7-day online course	See speaker's package for topics; BOR products to be sold include 6-CD audio program, flagship multi-media and subscription CD; free ebook and online course for participants (sent after event)	"Title of Workshop"; BOR products to be sold include 6-CD audio program, flagship multi-media and subscription CD; free ebook and online course for participants (sent after event)	"Title of Ebook"	"Title of Product" clamshell (includes 6 audio CDs + 36-page workbook)	Includes: 6-CD Audio Program; audio get-started course (1 CD + 200-pg sampler); 400-page manual	Live teleseminar with Expert selling Flagship Multi-Media product OR pre-recorded teleseminar on selected topics
<b>Our Cost on This Product</b>	\$0	\$0	\$0	\$6.65	\$28.00	\$40.05	\$0.00
<b>Minimum Sales Price of Product</b>	\$0	\$15,000	\$15,000	\$24.95	\$99.00	\$495.00	\$0.00
<b>Commission to JV partner</b>	\$0	\$0	Negotiate best split you can up to 100% of gate for Expert; minimum required: \$10K speaking fee or equivalent in net gate or net product sales	\$11.75 per ebook sold minus \$13.50 per refund	\$45.00	\$200.00	50-50 split on any tuition collected, paid 24 hours prior. On product sales, \$100 per unit of Flagship Multi-Media
<b>Our Non-Monetary Requirements</b>							
<b>: Minimum List/Group Size</b>	Any	Any	200	Any	Any	Any	400
<b>: Reciprocation</b>	Email to our list of names (with Expert's approval)	None	None	Negotiable with Expert's approval	Negotiable with Expert's approval	Negotiable with Expert's approval	Negotiable with Expert's approval
<b>: Collection of Funds</b>	We collect on sales	Checks payable to our company; 50% due on booking; 50% due one month prior to event; bookings less than 30 days out are payable in full at time of booking; we collect funds for BOR sales	Checks payable to our company; 50% due on booking; 50% due one month prior to event; bookings less than 30 days out are payable in full at time of booking; we collect funds for BOR sales	We collect funds through our shopping cart; checks disbursed 10th of month following end of refund period; checks cut with affiliate ID only	JV partner to collect funds, however, JV partner must submit cash with customer order information so we can ship product; on wholesale orders, terms are cash with order	JV partner to collect funds, however, JV partner must submit cash with customer order information so we can ship product; on wholesale orders, terms are cash with order	On resulting product sales, JV partner may collect funds, however, JV partner must submit cash with customer order information so we can ship product; on wholesale product orders, terms are cash with order
<b>: Advance Notice to Execute</b>	2 hours	Usually one week	Usually one week	48 hours	48 hours if we have inventory	48 hours if we have inventory	2 hours
<b>: Copywriting/Website</b>	We have written descriptions.	We have a speaker's kit, bio, photo & articles. Expert will provide a handout.	We have display ads, flyers, eblasts, radio spot, invitation, press release. We do not have website copy.	We will create the website and use our shopping cart; JV partner will receive affiliate ID for payment	JV partner can write the copy OR they can pay our preferred writers to write the copy	We have website copy; JV partner can set up their own website or re-purpose the copy for direct mail and other formats. We also have a pre-recorded teleseminar.	JV partner can write the copy OR they can pay our preferred writers to write the copy
<b>: Other Ways to Promote Offer</b>	JV partner should suggest any alternatives they wish to use; alternatives must not require Expert's time	None	Teleseminar with Expert promoting event; pre-recorded teleseminar; radio & TV interviews; recorded WAV files emailed to prospects	JV partner should suggest any alternatives they wish to use; alternatives must not require Expert's time	JV partner should suggest any alternatives they wish to use; alternatives must not require Expert's time	JV partner should suggest any alternatives they wish to use; alternatives must not require Expert's time	JV partner should suggest any alternatives they wish to use; alternatives must not require Expert's time
<b>: Required Effort By JV Partner</b>	Add E-book to their website and provide written eblast for promotion	Provide first-class travel for Expert; reproduce handouts; promote Expert to group ahead of event	Provide first-class travel for Expert; reproduce handouts; promote Expert to group ahead of event	Market aggressively to their e-list; put a permanent link on their website, if possible	Pay to promote clamshell to their names, whether direct-mail, email, BOR or through other means	Pay to promote product to their names, whether direct-mail, email, BOR or through other means	Promotion of teleseminar required. Additional promotion required if it's part of a coaching program.
<b>: Other Requirements</b>	Approval of product, website, person prior to emailing their offer to our list; free offers only - no sales offers to Expert's list	Business topics only; small business audience required; Expert must be allowed to do Back-of-Room sales with no split to organizer	Business topics only; small business audience required; Expert must be allowed to do Back-of-Room sales with no split to organizer	Possibly bonus or bundle the ebook on CD (at JV partner's cost); per copy royalty to us is \$6.80	Our company assumes ownership of name of buyer	Our company assumes ownership of name of buyer	Our company assumes ownership of name of buyer
<b>How Director of Business Development Earns Commission</b>	Embedded affiliate links to our landing page and shopping cart; DBD is commissioned on digital or physical products sold to JV partners they secure.	Sliding scale on bookings	Sliding scale on bookings; percentage of gate and product sales	Fixed amount per unit sold.	Fixed amount per unit sold.	Fixed amount per unit sold.	Percentage of gate. Per unit amount on products sold.
<b>DBD Commission</b>	20% of gross, which is revenue minus fulfillment cost minus refunds (see refund reserve policy)	\$1,875 per speaking engagement booked at \$15,000; 10% on all engagements booked below \$15,000	\$1,875 per speaking engagement booked at \$15,000; 10% on all engagements booked below \$15,000; 10% of Expert's portion of gate and 10% on BOR sales	\$4.90 per unit on any ebook sold electronically and digitally downloaded. \$1.00 on any ebook packaged into a physical or bundled form.	\$12.00 per unit sold.	\$40.00 per unit sold.	12% of gate amount Expert receives. \$40 per unit of Flagship Multi-Media Product sold via pre-recorded teleseminar. \$25 per unit of Flagship Multi-Media Product sold via live teleseminar.
<b>Absolutely Do Not Do</b>	We do not give away physical product; must offer digital products only. We do not put up cash to pay promotional costs. We do not pay commissions on any product sold later.	We do not fill seats for speaking engagements. We do not put up cash to pay promotional costs. We do not pay commissions on any product sold later.	We do not fill seats for one-day workshops. We do not put up cash to pay promotional costs. We do not pay commissions on any product sold later.	No reciprocal deals without Expert's approval. Bundled ebooks must be on their own CD, not subsumed into another product or collection. Ebook not sold in printed form. We do not pay promotional costs. No commissions on future sales.	Cash with orders only, as described above; no refund reserves will be allowed. We do not put up cash to pay promotional costs.	Cash with orders only, as described above; no refund reserves will be allowed. We do not put up cash to pay promotional costs.	We do not market other people's teleseminars to our list. We do not put up cash to pay promotional costs.

## Affiliate Manager

Joint-venture partners on the Internet who endorse your certification program and send you leads are called *affiliates*. And the job of recruiting affiliates, managing those relationships, and supplying affiliates with tools they can use to promote your program at their website is done by an Affiliate Manager.

If you have any Internet presence at all, you need affiliates to promote for you—and eventually, as your certification program grows, you will need an Affiliate Manager to manage your affiliate relationships.

Of course, in the early stages of your company's growth, you can combine the Affiliate Manager position into either the New Business Development role, the Marketing Implementation job or the Internet Promotions Manager position. Eventually though—and hopefully—your online presence will become so robust that you'll need someone full-time to manage your affiliate program.

### Finding a Good Affiliate Manager

A leading Internet consultant once told me that most of the top Affiliate Managers on the Internet today are women. I don't know if that holds true for every company, but I can tell you that women are typically superb at relationship-building, follow-up and just plain calling to check in. These are the hallmarks of a good Affiliate Manager. In fact, ultimately, you'll want them to be on a first-name basis with the top 5% to 20% of your affiliates—since those are the ones who will likely produce 95% of your affiliate-generated business.

Other attributes of a good Affiliate Manager include constantly following up with email list owners—including those who say *No, Not now, Maybe in six months, Not the appropriate offer, Price point too high for my list, Need a different product*—or worse—no response at all. Good affiliate managers are not daunted by rejection, nor do they take anything personally. They understand that building a successful affiliate program is really just a numbers game. The more potential affiliates they contact and the more professional-looking, top-notch marketing campaigns your company runs online—the more quality affiliates you'll recruit.

Of course, recruiting them is only half of the formula. Your Affiliate Manager also has to continually encourage affiliates to run your promotions to their list—and your company needs to constantly produce fresh new emails, lead magnets, and other tools they need in order to do so. Affiliates will rarely write their own copy to promote your product—or even think through how your promotion will appeal to their list. They rarely advise on bonuses-with-purchase, price points, discounts and other details. All those details are your Affiliate Manager's job.

Online services such as [www.upwork.com](http://www.upwork.com), [www.agentsofvalue.com](http://www.agentsofvalue.com) and [www.guru.com](http://www.guru.com) all have seasoned Internet professionals who can help get your Affiliate Program started.

### Interviewing Affiliate Manager Candidates

When interviewing a potential Affiliate Manager, there are key characteristics to look for. First and foremost, a top candidate should be friendly and personable, with sales background of some kind preferred. Often times, your Affiliate Manager will need to convince a tentative website owner to say “yes” to promoting your certification program or service.

A top candidate should also have some familiarity with how marketing campaigns are conducted on the Internet—since it’s likely they’ll get questions about how your campaigns will be run. Terminology like autoresponders, drip campaigns, lead magnets, CRM, affiliate tracking, long-form copy, landing page and other terms related to e-commerce are words your Affiliate Manager will hear every day (and should know).

But perhaps the best skill of all is the ability to pro-actively seek out companies, membership sites, newsletter publishers and website owners whose customers, subscribers, members, students and others would be perfect prospects to buy your certification program or other services. A good Affiliate Manager is always identifying potential new affiliates and contacting them to recruit them as promoters for you.

Considering that you stand to make hundreds of thousands of dollars (or even millions) on the Internet, your Affiliate Manager will be a key player on your cash-generation team. So be sure to keep the above key skills in mind when interviewing potential candidates.

To help you develop your own list of interview questions, review the sample questions below:

### Interviewing Affiliate Manager Candidates

*Could you detail the types of affiliate programs you’ve worked on for previous employers?*

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*What products or services were sold and at what price points were they offered?*

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*How many affiliates did you manage at any one time? \_\_\_\_\_*

*Do you know how many of those affiliates generated regular sales? \_\_\_\_\_ / \_\_\_\_\_%*

*How many affiliates did you personally recruit or add during your time there? \_\_\_\_\_*

*What did you find was the best way to recruit affiliates? \_\_\_\_\_*

*Did you have a basic sales script or email that you sent to affiliates to recruit them? \_\_\_\_\_*

*Was it easy to recruit affiliates for your past employer(s) or clients? \_\_\_\_\_*

*If not, what was difficult about it? \_\_\_\_\_*

*What kinds of tools did you initiate or make available to affiliates to use in promoting your employer's product or service?*

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*Did you personally negotiate commissions, profit splits or other payouts to affiliates? \_\_\_\_\_*

*Did you maintain affiliate blogs or other communication tools specifically to communicate with affiliates on a regular basis?*

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*How often did you communicate with affiliates? What kinds of things did you announce to the affiliate database?*

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Have you ever worked with CPA affiliate networks\* or brokers? \_\_\_\_\_

What are the challenges and benefits of working with them?

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\* CPA stands for Cost Per Acquisition. A single CPA network will recruit tens of thousands of website owners (affiliates), then configure your promotion to run at their websites. The CPA network tracks sales and pays affiliates a commission for each sale. For a list of top CPA Networks, visit: <https://mthink.com/all-networks/best-cpa-networks/>

Once you've determined the candidate's level of expertise in building and managing affiliate programs—and their expertise fits what you are looking for—you can begin to ask more specific questions about such matters as their desired compensation, expected staffing or budget requirements, availability, and so on.

### Hiring and Negotiating Affiliate Manager Pay

Many affiliate managers I know work only part-time for their clients—and they may have more than one client, too. In other words, don't feel that you have to hire someone full-time, unless you have a plan for conducting an active and robust affiliate program needing constant management. That means you not only have a website that constantly sells—but you also have an aggressive promotional calendar *with the time and copywriting ability* to run promotions at your website or to your list on at least a monthly basis.

What should you pay an Affiliate Manager, whether part-time or full-time?

The ideal situation is to motivate them by paying most of their compensation as a percentage of sales generated by the affiliates they recruit—or, alternatively, a flat fee per new affiliate that they recruit. As another alternative, you could pay them a small monthly retainer for the first 90 days to cover their expenses—then pay them an amount for each certification program or other service sold through affiliates that they have recruited for you. Never worry that your Affiliate Manager might “make too much money.” I've written checks for \$25,000 and more—because my Affiliate Manager recruited new affiliates who endorsed my programs to their customers who eventually purchased several hundred thousand dollars' worth of products. We were both happy.

### Defining the Job Duties

The actual job duties you assign will depend on whether you have an established affiliate program or not. I find that almost all small businesses could be doing more to build their affiliate program, so I'll base my recommended duties on the three different development stages your

company may be operating under. In each of the three stages below, your Affiliate Manager should:

**Stage One:** Set up your affiliate registration and tracking system (or your entire CRM, if not established already). Develop initial affiliate promotional tools such as email announcements, newsletter articles and banners.\* Program individual products into your shopping cart to calculate commission payouts to affiliates. Add a link at the bottom of your website that reads, “Join Our Affiliate Program.” Send these click-throughs to an affiliate-only webpage that convinces prospective affiliates to click through, register in your shopping cart’s affiliate section, download your pre-written tools—then begin promoting for you.

**Stage Two:** Recruit initial “super-affiliates” (those website owners with large email lists or special affinity with their list) to send an email to their list with a powerful endorsement of your certification program or service. Recruit and manage these initial super-affiliates by telephone and email. Coordinate and launch an initial marketing campaign promoting your entry-level product to these super-affiliates’ lists.

**Stage Three:** Begin communicating via email, webinar, or other mass-communication means with affiliates generated by your initial marketing campaign. Build affiliate database by researching potential affiliates then emailing them directly with an invitation to promote for you. Continue communication with them. Approach CPA† affiliate networks to promote to tens of thousands of affiliates at one time. Plan an annual schedule of Affiliate promotions.

\* More about affiliate recruitment systems and tools can be found in System Two: Your Internet Selling System.

† CPA stands for “cost per acquisition.” A single CPA network will recruit tens of thousands of website owners (affiliates), then configure your promotion to run at their websites. The CPA network tracks sales and pays affiliates a commission for each sale.

## Offline Marketing Manager and Speaker’s Agent

All marketing promotions are implemented either online or offline. What are offline promotions? Anything that takes place outside the Internet. For instance, in the case of a certification program, they might be:

- Trade shows
- Direct mail
- In-person preview events
- Press releases (if your market is local)
- Display advertising in trade magazines
- Speaking engagements

When building your optimum cash-generation team, it’s best to think ahead toward splitting your marketing management between online promotions (Internet marketing) and offline promotions. The main reason for this is that online marketing is highly specialized. With new technologies and opportunities being developed almost daily, it’s difficult for one manager to maintain up-to-the-minute knowledge about the Internet—particularly if you have lots of marketing programming to manage which doesn’t leave extra time for training.

Of course, at first, *you may not need to split the position* between online and offline management. When starting out, you can easily combine all marketing management into one part-time or full-time person. Just keep in mind that someday you'll likely want to have two different types of Marketing Managers.

## Finding Offline Marketing Professionals

Good copywriting skills—or at least the ability to hire and manage outside copywriters—is key to performing successfully at this job. This is a highly skilled position, and top candidates will show an expertise with knowing which promotions to run, where to place them, how to cut costs, what offers to make in the promotion—and most importantly—how to execute a promotion to the last detail (including writing any marketing copy, if necessary).

For this reason, it's important to take time finding the right person for this position. And be aware that you may go through two or three new-hires before finding the manager who ultimately grows your business substantially.

For most small businesses, you'll want someone who is comfortable developing a promotional plan, then initiating all promotions—without you telling them what to do every step of the way. In fact, you'll ideally want someone who knows more about marketing than you do.

Why?

Because the truth is most small business owners go into business to pursue something they love to do. Too often, however, *they are not great marketers*. If this describes you, then you need an initiator who will take charge of your marketing promotions and execute them with assurance.

Regardless of where you post this job, one way to make sure the perfect candidates respond is to write your job description in such a way that top candidates will be excited to work for *you*. As I've mentioned before, don't just explain the job, but talk about your company and why it's such a pleasure to work there. Talk about the superior or innovative marketing you're doing (or about some of your business growth successes that make you unique). Describe your company as a marketing-oriented business so they know they'll be a key player versus just another manager. By using these techniques, you'll get top candidates willing to work for the pay you're offering—regardless of whether they might be able to make more money elsewhere. Also determine the non-monetary advantages of working at your business and use them to draw top candidates.

Wherever you advertise, you can use the tried-and-true method of directing candidates to your website for more information. This not only personalizes your company as a possible employer, it saves *you* time by encouraging candidates to de-select themselves if they aren't qualified or interested.

## Defining Initial Job Duties

Before advertising, be sure to define the job duties your Offline Marketing Promotions Manager will be responsible for so you can mention those specifics in your help-wanted ad or webpage. Take a look at the list of possible offline promotions again:

- Trade shows
- Direct mail
- In-person preview events
- Press releases (if your market is local)
- Display advertising in trade magazines
- Speaking engagements

Do you exhibit and promote your certification program at trade shows? Do you run magazine ads? Do you conduct teleseminars? Choose from the list above in defining those marketing projects you want the new Manager to execute. Be sure to decide, too, which related tasks you will do, what the Manager must do, what outsource vendors can do, and who will manage those vendors.

A great exercise for creating this task list is to spend an hour or so writing down everything you do now related to various marketing projects—or that you know must be done. I’ve found an Excel spreadsheet is great for listing individual tasks as line items. Assign categories to each line item such as frequency, one time vs. ongoing, in-house vs. outsource, and so on. It’s surprising how much different your help-wanted ad might appear to you once you go through this exercise. Make any necessary adjustments to the wording of the ad before running it.

## Interviewing Offline Marketing Manager Candidates

Everyone has the ideal candidate in mind. I know I do. But be aware that you won’t find the ideal person unless you’re specific about the questions you ask—and you’re truly dedicated to discovering their true capabilities and deficiencies.

Additionally, since attitude and work ethic are more important in this job than almost anywhere else in your company, your interviewing technique needs to be extra vigilant in drawing out these characteristics. Some companies I know even have top candidates take a personality profile test to ascertain the candidate’s work ethic and attitude. These companies know that if their promotions don’t run on time because their Manager didn’t “get around to it”—or a trade show application doesn’t get submitted by the deadline because of a lackadaisical attitude—company revenues will suffer. Prospects don’t get generated, sales leads don’t call, and joint-venture partners fade away due to lack of diligence in the area of marketing.

To avoid this situation, ask about their background in executing marketing programs, but also in handling difficult or problem promotions, delayed promotions, vendors mistakes, and other situations that invariably arise.

To conduct a proper interview, make a list of questions that determine how well they executed each of the offline marketing projects you listed above. Consider trade shows, for example:

## Interviewing Marketing Implementation Candidates

*Have you ever coordinated a trade show exhibit for your employer? \_\_\_\_\_*

*How often did your company exhibit? \_\_\_\_\_*

*Have you ever coordinated the purchase of a new trade-show booth? \_\_\_\_\_*

*Have you ever written a script for use by booth personnel? \_\_\_\_\_*

*What were the main goals of the trade shows you exhibited at?*

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*Using specific numbers, how well did the company meet those goals?*

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*Did you conduct pre-show marketing? What marketing materials did you produce for use before, during and after the trade show? Did you develop in-booth promotions or show specials?*

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*Did you develop any sort of ongoing marketing for the leads generated at the show?*

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*Did you coordinate any speaking engagement by your company's salespeople or executives in the educational portion of the trade show? What kinds of materials did you produce for that?*

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Like I said, for each individual marketing campaign or project area your company pursues, write down every conceivable related question to determine whether your candidate has the necessary expertise to coordinate that kind of marketing. Then jot down questions that will elicit details about their attitude, work ethic and management style. Tell the candidate there are no right or wrong answers here—you just want to be sure they (and you) are the right fit:

*What would you do if a vendor did not deliver your marketing materials on time and it looked like the promotion might have to be delayed?*

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*Are you accustomed to working alone on marketing projects and if so, what stages do you prefer to control 100% . . . Scheduling? Planning? Copywriting or development of marketing materials? Database Analysis or Overlays (calculating response rates by list segment)? Implementation? Vendor coordination?*

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*Tell me a little about your management style, how you delegate project-related tasks and how you monitor whether they are getting accomplished. Do you use any sort of system or tools to manage projects? At what point do you step in to turn things around when a critical project component may be in jeopardy?*

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## **Hiring and Negotiating Offline Marketing Manager Pay**

Once you've found a top candidate, it's time to make him or her an offer. Before doing that, however, use the final minutes of the interview to clarify what they're looking for concerning compensation, work schedule, department budget, support staff, telecommuting, start date, and so on. Give yourself at least a day or so after the interview to formulate (or review) what you can afford to pay them—and to evaluate your preferred candidate against others you interviewed. My advice is to never make an offer to a top candidate during their initial interview.

What should you be willing to pay an Offline Marketing Manager?

It really depends on how much work there is to do, what level of expertise you require (they may have more than you need), whether you can meet their desired compensation with a combination of salary plus profit-sharing, whether you want to meet it, and so on. And don't be put off by your top candidate's so-called "salary requirements." What many small business owners don't know is that candidates typically make a big list of what they're looking for in the way of compensation (including profit-sharing, equity, stock options, benefits, time off and so on)—but you don't have to agree with that list. You can always make an offer and let the candidate decide whether they'll take the job for that. Or, let them make a counter-offer for you to consider.

If you've done the job of making your company look enticing, your top candidate may agree to a much smaller compensation package in order to work for you.

## Hiring a Speaker's Agent

If a major component of your offline marketing plan is speaking at industry conferences to recruit coaches or practitioners for your certification program, you can hire a speaker's agent separately from your offline marketing manager.

Many agents work for a fixed fee to research events you would be perfect for, start the process of marketing to them, interact with leads when event planners show interest—and even negotiate your booking, handle the contract process, and coordinate pre-event and post-event communications. When you're booked, the fixed-fee agency may also take an additional sales commission of 20% to 30% of your speaking fee.

If you're highly bookable (and can show a prior history of strong bookings), some agencies will sign you on a commission-only basis of 25% to 30% of your speaking fee.

## Online Marketing Manager and Webmaster

Offline marketing—such as trade shows, direct mail and print advertising—is really only a small part of your total marketing approach. The larger portion is *online marketing*.

Today, the Internet has become a very complicated place. In fact, just the overwhelming number of marketing and advertising options can be daunting. Add to that the fact that so many online marketers specialize in different types of strategies, and it's easy to see that if you haven't determined yet which types of promotions you'll be running, you'll have a difficult time hiring the right person for the Internet Promotions Manager position.

What's more, unless you have *some* presence on the Internet, you won't have any traffic and conversion statistics from which to establish benchmarks that could be used to pay someone compensation based upon growth or improved conversion.

One way to get around these difficulties is to make a start using at least the Three-Page Website Formula (offering a lead magnet) found in *Module 6* of the *Resources Portal* where you found the document you're reading now. Once you have a website that generates high-quality leads for your certification program, you can begin looking for someone who can manage at least traffic generation for you. That's a start.

If you prefer to have your Internet Promotions Manager launch everything for you on the Internet, be prepared to pay more money up-front since the amount of work involved to start-up a web presence is extraordinary (though only for a short, concentrated period of time).

## Defining the Job Duties of an Internet Promotions Manager

In addition to everything else they might do on the job, your Internet Promotions Manager should ideally be able to act as a webmaster, making simple copy changes to webpages, programming new products or affiliate commissions into the CRM, and overseeing any outside contractors who do more extensive website development work for you. Basic webmastering should always be a primary skill in a good Internet Promotions Manager.

What other job duties might an Internet Promotions Manager perform?

The list below will give you some idea of the realm of possibility. But, as I said earlier, so many online marketers specialize that matching their skills to your promotional calendar is key.

Be aware that some candidates will specialize in *several* of the categories on the next page:

<b><u>Specialized Skill</u></b>	<b><u>Good for These Types of Online Marketing Initiatives</u></b>
Search engine optimization	Boosting your non-paid “natural search” rankings in search engines by adding keywords to your webpage(s).
Paid search; pay-per-click	Increasing search-engine rankings for those consumers typing search keywords for your type of methodology, products or services. Also good for profitably using paid traffic generation.
Online article writing & placement	Driving traffic to your Opt-in Page to opt-in for your lead magnet (visitors then click through your Three-Page Website Formula). Improving site credibility.
Email marketing	Sending customized promotions to your own list of email addresses. Preparing emails for affiliates to send to their list(s).
Blogging	Posturing you as a leading authority in your industry.
Podcasting	Either producing, distributing and managing your own podcast or securing guest interviews on other, targeted podcasts.
Direct-response copywriting	Launching all web promotions. Improving opt-in rates at Opt-in Pages. Improving click-through rates at sales pages. Decreasing order abandonment at the shopping cart. Improving upsell rates after initial purchase. Improving sales from autoresponder drips.
Membership site management	Launching and updating certification training resources at your website, as well as upselling to post-certification merchandise, events, or further training.

Product launch campaigns	Building an interest list for your certification program. Developing actual sales leads. Attracting affiliates and super-affiliates. (For details on conducting a product launch campaign, see Module 7 of the <i>Resources Portal</i> where you found the document you're reading now.)
Promotional webinars	Setting up registration pages. Writing and emailing announcements of the webinar. Assisting you with webinar outline and pitch scripting, Programming reminder emails and SMS/texts. Developing a follow-up campaign to attendees and no-shows.
Site optimization & compatibility	Improving click-throughs and purchases by analyzing and changing webpage copy and design elements. Analyzing and correcting browser problems visitors might experience.
Web metrics analysis	Increasing both click-throughs and purchases by analyzing opt-ins and click-through rates, by conducting A/B split testing of headlines/offers/prices, and by analyzing other variables. Decreasing pay-per-click fraud. Improving profitability of pay-per-click activity.

Once you've determined which type of online marketing you'll do—from email marketing to podcasting to product launch campaigns—you can begin to make a list of the job duties your Internet Promotions Manager will need to perform. At the very least, here are the basic duties that I would require of any top candidate (whether they do the work themselves or coordinate with outside contractors to do it):

- Launch new websites or new webpages using proven direct-response copywriting techniques
- Program the CRM and shopping cart including product codes, affiliate registration area and autoresponder drip sequences
- Optimize site design and keyword placement on pages to boost natural search rankings
- Plan, coordinate and implement all scheduled promotions such as product launch campaigns and affiliate promotions
- Schedule, write and implement all email promotions to company's list of email addresses (or oversee copywriters to write them)
- Analyze opt-in rates, click-through rates, order abandonment rates, and other web metrics
- Plan and implement ongoing communication with your list via autoresponders, blog posts, newsletters, and individual email offers
- Regularly back-up all data including webpages, graphics and other files on cloud server and external hard drive. Back-up all autoresponder copy. Back-up list segments.
- Maintain accurate listing of all login and passcode information providing access to CRM, domain registration, and web hosting.

## Finding a Good Internet Promotions Manager

Too many small businesses ask their friends, colleagues, or kids for referrals to web designers and Internet marketers. Not only is this a bad idea (unless that family member is a *seasoned* veteran currently generating millions a year on the Internet), it's completely unnecessary when good online promotions professionals abound on the Internet.

Finding them often requires a somewhat unorthodox approach, however.

Additionally, you should approach hiring differently depending on whether you need to find someone local or are willing to work virtually with your top candidate. A vast majority today are remote workers.

If a local employee is essential, try Indeed.com for recruiting top people (companies from 60+ countries already list their jobs there).

If you're willing to work virtually with an Internet Promotions Manager—as many multi-million-dollar companies do—then the world is your job market. Today, everyone from LinkedIn.com to thousands of niche markets worldwide have job boards. Simply do a Google search for “\_\_\_\_\_ jobs”—filling in the blank with your niche market or industry of choice.

One further point about hiring: You should ideally seek someone who has a marketing “voice”—that is, a friendly, conversational way of talking one-on-one with website visitors. One of the best places to find marketers with this kind of voice (which they can infuse into website copy and promotional offers) is to research blogs in your industry that you like.

Often times, blog owners—and those who post at blogs—have the exact “voice” you're looking for, and many of them are job hunting! The reality is that bloggers and blog owners post because they are passionate about that industry or hobby. If you encounter a blog owner who really “gets it” about your industry and the kind of marketing that's needed (and why your certification program is a fantastic idea), send a private message complimenting them and mentioning you're looking for someone with that exact viewpoint and voice to be your next Internet Promotions Manager.

Other ways to find good Internet promotions professionals is to click through sites you like until you find the name of the person doing the work on that site (often an agency with their logo featured in the bottom right corner). Alternatively, you can check out your competitors' websites. It's possible their marketing person or independent contractor is identified on the site and is looking to make a change.

## Interviewing Internet Promotions Professionals

Once you receive replies to your job posts or other inquiries, review the responses and then use email to set up Zoom interviews a few days later. Tell the respondent who you are, where your website can be found (if you have one), or how to otherwise access information about you.

When you begin the interview, ask the most important question first: *Have you been to my website?* If they haven't, immediately conclude the interview. They are not a marketing person.

If they have been to your site, proceed to Question 2: *What would you do to improve the site?* Here's where you'll find out whether the candidate is the right person for you. Did they read your Opt-in Page and notice your opt-in form? Did they opt-in to read your autoresponders? Do they have an opinion of whether or not you successfully presented the benefits in your copy?

Are they telling you about the things you might have done differently or need to add to your site? Have they hit all the points about your site that *you know you need to change*? Let them talk about what they would do for you. Then listen and take notes.

Conducting your interviews in this way will help you narrow your list to the top three candidates. When you've identified those three, ask them to take the stunningly accurate personality test from Kolbe Corp ([www.kolbe.com](http://www.kolbe.com)) to find out what type of personality, work ethic and attitude they have. For about \$100, you can also take the employer's version of the test to help you determine which characteristics you think are ideal in that job position. Once your top candidates take their test, the system will match up your benchmarks with their answers and determine how well they fit your criteria. The results may surprise you.

## Hiring and Negotiating Pay for the Internet Promotions Manager

If you live near one of the major cities that are expensive to live in, expect to pay top wages for a local employee. But if you're able to work virtually with someone elsewhere, you can easily pay just a fraction of that salary. One way to get an idea of what professionals in your city are earning is to log onto Monster.com and scan the job postings for Internet promotions managers or marketing professionals to see what pay and benefits are being offered. That's probably the standard rate in your town.

Of course, there are many different ways to pay your Internet Promotions Manager. You could pay them a small monthly stipend—with additional compensation based on the actual results they create for you as long as they are still employed (all payments should stop if they are ever fired or leave your employ). This formula tends to motivate promotions managers to continually work hard planning and executing promotions. You could also:

- Pay them a fixed fee for random projects—but only pay upon completion.
- Pay them by the hour for certain duties you define—such as writing blog posts, sending email offers to your list, and so on. Be sure to define how many hours will be authorized for each duty—either weekly or monthly.

## Outsourcing Marketing and Income-Generation

Virtually every task can be outsourced these days. And while *all of the key staff positions* in this tutorial *can* be outsourced, only you can ultimately decide which you'll want to outsource and which you will keep in-house with local employees reporting to your place of business.

### Deciding What to Outsource

In the early stages of your business, you'll likely want to outsource much of your Internet marketing management, affiliate management and new-business development to specialty vendors and consultants—while you may want to keep your inbound phone answering, sales, and practitioner support in-house. This is recommended for two reasons: (1) you'll do very little specialized online marketing, recruit very few affiliates and field very few opportunities for expansion in the earliest days of your certification program (so a part-time outsider is most appropriate), and (2) you'll want to keep all coach and practitioner interactions very close to you

in the early days so you can learn which sales pitches they respond to, what types of questions they frequently ask, what types of support issues arise and so on.

Of course, many certification programs today *outsource everything* to remote workers and independent contractors, but treat those team members as long-time staff and hold in-person meetings to bring the team together (twice a year, for example).

Outsourcing post-certification merchandise and service delivery is also an option—depending on your type of business, whether coaches and practitioners expect you to personally perform the work, the level of quality required, and whether outsource vendors exist for your type of business.

To determine what you’ll need or want to outsource, take time now to make a list of all income-generating job functions in your company—whether you perform them or not. Just writing them down will help you determine whether you can outsource them—or wish to. Use the list of typical job functions below to help you create your own list:

**New Business Development**

- New client recruitment
- Joint-venture research and initiation
- New product design and development
- New markets and global expansion
- Licensing

**Marketing**

- Offline marketing and lead generation
- Online marketing and webmastering
- Public relations and media relations
- Trade show coordination
- Affiliate management

**Sales**

- Sales script writing
- Sales training
- Leads analysis
- Sales presentations

**Practitioner Support**

- Technical support
- Customer service and order tracking
- Billing resolution and save-the-sale
- Training calendar and access to your advice

To begin the process of outsourcing, decide which of the above duties you can comfortably delegate to someone else. Check off each job function you’ll outsource using the checkboxes above, then record the specific duties you’ll want the outsource vendor to accomplish. Like this:

- Affiliate Management      Duties:
  - *Set-up affiliate registration area of CRM/shopping cart*
  - *Set-up “Join Our Affiliate Program” page at website*
  - *Write affiliate recruitment letter / email campaign*
  - *Recruit 25 affiliates from my personal Rolodex*

**Job To Be Outsourced**

**Specific Duties I Would Like Accomplished...**

\_\_\_\_\_ Duties: \_\_\_\_\_  
 \_\_\_\_\_  
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\_\_\_\_\_ Duties: \_\_\_\_\_  
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You can also outsource other functions of your company easily and inexpensively. In fact, it's particularly smart to outsource those functions that require too much of your time—or require expertise you don't currently have, such as accounting. Take a look at the following list of other job functions in a typical company to help you decide whether to outsource additional jobs:

**Administrative**

- Telephone switchboard
- Purchasing
- Human resources and hiring
- Security
- Facilities

**Product/Service Delivery**

- Scheduling
- Technician training
- Retail clerks, wait staff and service staff
- Production of consultant's work product
- Shipping and fulfillment

**Manufacturing/Retail Purchasing**

- Inventory management and warehousing
- Receiving and stocking
- New product and new supplier research
- Manufacturing plant management
- Prototype design and development
- Store design and Planogram development
- Supply chain management

**Financial/Accounting**

- Billing and accounts receivable
- Bill paying and accounts payable
- Payroll and benefits management
- Tax accounting and financial reporting
- Banking (outsourcing not recommended)
- Account credit approval/management
- Securing loans/credit facilities/factoring

**Legal/Compliance**

- Contract review and proposal review
- Employee policies and sales policies
- Corporate structure and corporate filings
- Intellectual property, trademarks and patents

## Finding the Right Vendors or Independent Contractors

There are many places to start looking for independent contractors to outsource job functions to. And while working virtually may be uncomfortable to you as a business owner—that is, working with numerous contractors outside your city, some of whom you may never meet in person—be aware that today, entire multi-million-dollar businesses are run with remote workers, either on a partial or completely outsourced basis. The key is to find the right people, then manage communications, expectations and assumptions throughout the outsourcing relationship.

Your search for the right people may take two approaches: (1) Asking for referrals from other business owners you trust, and (2) searching through the many online resources that are designed to link business owners like you with professionals who work virtually. While the following is not a complete list of all such resources, they are considered to be the best in their category:

- Upwork.com—marketing professionals, internet professionals and all other creative types such as marketing copywriters, PowerPoint designers, graphic designers, etc.
- AgentsOfValue.com—Pay them a small monthly retainer to become your marketing/web team

While these sites are set-up to help you find a specialist for an individual project, it is possible to choose a contractor for your first project who offers many other types of services—effectively making them your *de facto* Internet Promotions “Manager” or New Business Development “Manager.” This not only addresses your longer-term income-generation needs, but also carries the added benefit of costing you money only when the outsource vendor does work for you.

## Negotiating Fees, Retainers and Budgets

In addition to the project bidding model used by Upwork and the fee structure of other sites, you can easily negotiate your own unique fees, retainers and commissions with any vendor you might work with. I’ve paid everything from monthly retainers for a pre-defined level of work to reasonable commissions only when sales are made—and everything in between.

To determine what you can afford to pay, first define how the contractor’s output will be used and what the anticipated income will be. Will they design a single brochure for your trade show (which by itself will do nothing)—or will they take over your entire trade show appearance including pre-show marketing, in-booth promotions, lead follow-up, and more which might earn you hundreds of thousands in new practitioner sign-ups?

Next, determine what you can afford to spend right now on *just getting started*—perhaps getting your three-page website written and designed, with you personally doing email marketing to the resulting opt-in names later. Many of these sites—particularly Upwork—draw specialists from all over the world including places like India, Romania and Phillipines where \$500 is a considerable sum for building a simple website. I’ve gotten many projects done through Upwork (formerly Elance) for \$250 to \$300. While the amount of money you’ll pay varies depending on your project needs, where your outsource vendors live, and so on, there are some steadfast rules and recommended methods for paying these people. Take a look at the chart on the next page:

<u>Type of Contractor or Outsource Vendor</u>	<u>Method of Payment or Compensation</u>
Receptionists, call centers & inbound phones	Low per-month minimum rate + low per-minute rate for calls above this minimum.
Customer service centers	Low per month minimum rate + low per-minute rate for calls above this minimum.
Virtual customer service staff (individuals)	Per hour rate with a weekly listing of calls in order to verify hours worked.
Commissioned salespeople	Fixed commission per certification or service package sold <i>after</i> the money is received and funds clear your bank account. Commissions should also be reduced due to any refunds processed. Bonuses permissible for achieving pre-defined benchmarks.
New business development	Flat percentage (15% to 20%) of the net revenues from deals they bring in.
Affiliate manager	Flat fee per certification or per service package sold to practitioners referred by affiliates they recruit.
Internet promotions manager / webmaster	Fixed monthly retainer or fixed per-project fee for a pre-determined schedule of promotions and management or for a specific pre-defined project. Occasionally webmasters are paid additional fees by the hour for updating pages, building infrequent new webpages, and doing individual analysis.
Offline marketing implementation	Fixed monthly retainer or per-project fee for a pre-determined schedule of promotions and management or for a specific pre-defined project.

## Providing Well-Defined Goals and Benchmarks

As I mentioned, there are steadfast rules for paying your outsource vendors. *Providing well-defined goals and benchmarks they must meet before getting paid* is one of them.

You would never blindly delegate a project to one of your own local staff, and then forget all about it. Well, delegating to outsource vendors is no different.

Before you assign the project, take time to determine the deliverables you expect *and when you expect them*—such as the initial layout of your website within two weeks or the initial draft of your brochure within six days. You can also designate how many hours you expect the vendor to work to accomplish the task—asking them to check in with you after six hours of work to be sure the project is on track.

I also ask my vendors to agree to finish the task with a certain number of hours, then tell me if they can't accomplish the job in that time. This keeps vendors from spending 16 hours on a project you thought would take only two. If they're spending more time than you expected, something about the original project description or instructions is unclear.

Another way to be sure the project is on track—and guarantee you aren't being charged more than you anticipate—is to hold regular Zoom meetings about the project. When it comes to projects going off-track, I detest email, instant messaging and voice mail. I want answers immediately—and the best way to do that is to jump on video-conferencing and speak directly to the vendor working on your project. Internet vendors in particular seem to prefer email updates, but that's never as good as person-to-person contact. Even if your vendor is halfway around the world, you can hold regular update meetings by Zoom or another video-conferencing platform.

## Firing Staff and Independent Contractors When You Need To

No business owner likes to admit they need to make a staffing change. Firing can be difficult, and—in some states or countries—risky if you have not already documented a history of poor on-the-job performance over a period of time.

I've always found the best way to part on amicable terms is to help the employee or independent contractor see that their talents lay elsewhere—either outside of your organization or outside of the job they are doing for you now. An experienced mentor of mine once said, "There are no bad people, just bad situations." It's true. And when it becomes obvious that your employee or contractor isn't performing to your satisfaction or isn't accomplishing what you need from them—and you've tried to resolve the situation with additional training or discussion—it's time to have the final conversation and help them transition out of your organization into a better situation for them (and you).

Before you fire someone, be sure to take steps to safeguard your business—including your customer records, voice mail system, email accounts, passcodes, physical documents and other assets such as equipment, vehicles and supplies. Change computer logins the employee has access to, change voice mail passcodes, redirect email accounts to yourself or other employees you assign for the task, schedule other employees to cover the phones or sales desk, advise outsource vendors that the employee is no longer authorized to give directives and so on—particularly if the terminated employee will be leaving immediately following the meeting.

Before mentioning the termination meeting, be sure to get any specific information you need about projects in process, contact names, sales leads in process, and so on. Additionally, be sure to retrieve any documents or equipment they may have in their possession outside of your office.

My recommendation is that you don't risk your business by letting the terminated employee work longer than a few days after their termination. In fact, many businesses end an employee's onsite presence immediately by walking them to the door. While the termination may be amicable, you cannot predict what a former employee will do to disrupt your operations during their final days or hours on the job—especially if they did not agree with the termination.

Be aware that a layoff is different than a termination. If you are downsizing and must let go some staff members, be sure they realize they are not being fired for poor performance, but merely because there is no future work for them to do or no money left to pay them. In the case of laying off an employee or eliminating their job, follow the same steps to secure your business assets. You may decide to give them several days or a few weeks to finalize projects for you before leaving.

## Planning a Termination

Prior to the termination meeting:

- o Review labor laws for your state or province as they pertain to termination:

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- o Document poor on-the-job performance or unresolved disciplinary issues:

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- o Investigate the status of projects in process:

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- o Secure contact information for key accounts and vendor relationships:

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- o Identify sales leads in process:

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- o Secure important files, documents, webpages, or work product:

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- o Retrieve equipment, keys to the building or offices, computers, laptops, software, directories, cell phones, vehicles or office supplies:

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**Be sure to change, rescind or otherwise safeguard:**

Email Account(s) \_\_\_\_\_

\_\_\_\_\_

Voice Mail Access \_\_\_\_\_

\_\_\_\_\_

Cell Phone Number(s) \_\_\_\_\_

\_\_\_\_\_

Customer Records

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Signing Authority on Credit Cards, Vendor Accounts, Purchase Orders, Frequent Flyer Accounts, and Shipping Accounts

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Sales Leads or Client Account(s)

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Domain or CRM access, logins and passcodes (especially the passcodes to your website's hosting panel and your CRM/shopping cart)

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