

HOW TO

BUILD

YOUR

DREAM

TEAM

CEO SCHOOL

# HOW TO BUILD YOUR DREAM TEAM

## CREATING AN ORGANIZATIONAL CHART

Identify roles and responsibilities. Don't think about people – think about what roles would need to be fulfilled with the work you already have, the weekly hours it would take, and what skills that person would need to have to be successful.

ROLE TITLE	RESPONSIBILITIES	HOURS NEEDED	SALARY

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## JOB ROLES CHEAT SHEET

- **An assistant:** VA or IRL, an assistant handles the daily and weekly tasks needed for the seamless execution of your needle-moving tasks. An assistant can manage a calendar, an inbox, can schedule meetings, and prepare documents you need for those, too.
- Next, an **Operational Business Manager, an OBM:** you have all sorts of wild ideas – who’s putting them in practice? Who’s making sure to implement it, and follow through until it’s done? That’s your implementor, and a great one by your side can be a game-changer. Make sure you hire with those skills in mind: someone who enjoys the nitty-gritty, who can project-plan with ease, and who knows the back-end of your business. This can be temporarily outsourced, for example, to set up a specific plan, but make sure you have someone on your team with integrator-like qualities.
- **Customer Success:** no matter what you do, you have customers reaching back out to you – good or bad, you don’t need to be handling each ticket. Establish a Customer Success Playbook on how you’d like to treat your customers, and train someone on it – stat!
- **A Marketing or Sales Coordinator:** again, no matter what business you have – not only do you have, but you WANT big sales, so this role is critical. Make sure you hire with that in mind: not everyone is a sales person, and that’s ok.
- **A Content Manager:** in this day and age, almost every business is present on social media, and managing that can be a full-time job, not to mention a sales source in itself. A Content Manager creates a content strategy, creates graphics, and creates copy in the voice of the company.
- **Community Manager:** depending on the size & engagement of your following, a community manager will post and do general upkeep of the community online: answering comments and DMs in real time.
- In previous classes, we talked about hiring a financial team being critical, too. Hire a **CPA or accountant that you trust, and a bookkeeper.** The bookkeeper will keep your financials up to date, and work hand-in-hand with your accountant to make sure you’re making smart (and legal!) financial decisions.

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## BUILDING A JOB DESCRIPTION

Use the digital asset: Job Description Template as well as the information you collected in the previous pages to create the job description. It usually entails the purpose, the types of work “including but not limited to”, detailed descriptions of each role and the hours per week.

## FINDING APPLICANTS & HIRING

It's now time for you to be the sales person of your own company and make it enticing to want to work with you: make sure the job matches the market in terms of compensation, hours and other perks. Referrals are the best way to get qualified applicants, so don't be shy. Finding talent within your network also helps ensure they have already been vetted by someone you know and trust.

When interviewing, think about hiring around core company values or belief in the mission. You need to hire someone who's excited to show up – not just the right skill set. You can teach someone any skill, but you cannot teach them the right values to align with your business. Finally: TRUST. YOUR. GUT.

## ONBOARDING CHECKLIST

When bringing a new hire to your team, the most important part is that they feel like a part of the team from day one. They need to feel empowered that they're co-creating the role with you, and that they're adding value.

- BOOK AS MUCH FACE TIME AS YOU CAN
- HAVE AN EMPLOYEE HANDBOOK READY
- SIGN LEGAL DOCS: CONTRACT, NDA, NON-COMPETE
- GIVE THEM THE TOOLS THEY'LL USE AND NEED
- GIVE THEM THEIR JOB DESCRIPTION & SOPS
- SCHEDULED TRAINING SESSIONS & TRAINING PLAN



### EFFECTIVE MEETINGS CHEAT SHEET

#### TOWN HALL

Once a quarter with everyone in the company, including external stakeholders, contractors, and temporary hires. This is where we realign all team members on the big goals ahead, what we've accomplished for the quarter, and how we're measuring against our yearly goals.

#### ALL-HANDS

Once a month with everyone in a given department: all the relevant players from finance, marketing, operations or strategy are present and feel included when you're realigning priorities, making decisions and evaluating progress.

#### TEAM SCRUM

Every week, we lead team scrum meetings, which are a quick and easy way to report on KPIs, set priorities and have your team communicate their needle-movers back to you so they're aligned.

#### ONE-ON-ONES

A one-on-one is a dedicated space on your calendar, it's a mental map for open-ended conversation between the manager and the employee. 1:1s are meant as a private space for coaching, mentoring, understanding how your employee is doing on a personal level and even just ranting. This is a great tool for every manager to ensure that they have open communication with dedicated time that is about the employee.

### TEAM BUILDING

This is our full circle moment: the moment where you get to live out your why. Because a company culture isn't about the perks and the lunches. A true team culture is about the 'why', the company's mission, its values. This is where you can bring your core values to light: how do they show up in real time in how you do business and treat your team? How do you make YOUR company become the company you would've loved to work at.

**YOU'RE  
A REAL  
BUSINESS  
NOW**

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