

## **EPISODE 31**

## From Solopreneur to Entrepreneur Interview Series with Heather Alice Shea: "My Team Helped Me Love My Business

## Again"

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Gary Vee: 00:00 Hey guys, it's Gary Vaynerchuck and you're listening to

the front row entrepreneur podcast with our girl, Jen.

Jen Lehner: 00:13 Heather Alice Shea is an intuitive life coach, life coach,

trainer and intuition educator who helps emerging coaches hone and own their innate intuitive abilities and create one of a kind platforms that book their business solid. Heather completed the front row CEO program and has a lot of great things to share with us about how she is collaborating with her new virtual assistant to really scale her business. Make sure and listen all the way through because we really get into the nitty nitty gritty, which I think you are going to find so helpful. If you've ever

wondered how to best collaborate with a VA.

Jen Lehner: 00:53 Hey Heather, how's it going? Hey Jen, how are you

doing?

Heather Shea: 00:56 It's so good to be here.

Jen Lehner: 00:58 Oh, I'm so glad you agreed to join me because, um, you

have hired, how many virtual assistants have you hired? One or I mean like how many are working with you right

now?

Heather Shea: 01:07 I have two.

Jen Lehner: 01:09 Okay. So, um, if people are really curious about how other

people are working with their virtual assistants, you know, I think, you know, everybody obviously has diff, different systems in their businesses and uh, different workflows.

And, um, really curious like, what are your virtual

assistants doing in your business? Tell us a little bit about

your business. Uh, I want to hear all about it.

Heather Shea: 01:34 Yeah. So that's actually a really, like, as you ask the

question, I find myself reflecting and going, Oh my gosh, you know, what are both of them doing every day? Well, this is crazy and Holy cow, I can't believe I've overcome my fear of delegation to the extent that they are actually working that much. Um, I would say when I started with my VA, so, and I used, you know, your whole system, so thank you so much for that. Um, I began with asking myself what is the one thing in my business that I'm spending the most time on that I know is, is completely not revenue producing. And for me that was calendar management. So if I would say, you know, what is the one thing that they're doing? Like the biggest thing that I offloaded that I felt an immediate, not only personal relief, just my, my stress level, the quality of my actual life, you know, came back to me and I started really enjoying

being in my business.

Heather Shea: 02:37 But managing my calendar has been a big one. So I

started with, Hey, just, I'm going to let you book all my appointments from now on. Just that was it, not even the whole calendar, right? Like I was so anal retentive, I'm like, just, I'm just going to let you book this one type obsession. And so, um, so it was just that, right? Like I, we did a fun, I call them teen parties, so I jumped on a, I'm on

zoom and I, you know, within 20 minutes I had her trained on how to do it. And then after she mastered that one task and she got used to the, the, you know, the scheduling system, it was just gangbusters from there. So then from there it was all of my appointments. And, um, just this week she and I spoke about me creating a Google, like inside my actual Google calendar. You can add more to that so that she can even begin managing my calendar straight out of Google.

Jen Lehner: 03:36

Yeah. I have to say for me, uh, and I wish I would've done this sooner. I mean, I've been working with virtual assistants for years now, but, um, the scheduling, it was actually one of the last things that I gave to my own VA's and, um, you know, I'm sort of kicking myself because that has been extremely liberating. So whenever I get, you know, whatever kind of appointment it is, whether someone wants to be on my podcast or they want me to come on their podcast or you know, or whatever the appointment is, all I have to do now is forward the email. Well, no, I don't even forward it because my VA's checked my inbox. So then they know exactly what to do because they're managing my whole calendar so they know exactly when I'm free and when I'm not free. And all I gotta do is show up.

Heather Shea: 04:21

Yeah. And I, you know, it's funny, Jen, that you say that like I don't, you know, they know my whole calendar, they checked my inbox, you know, me to me 90 days ago I would have gotten so verklempt over that I would, I would've said, but how, how, how do you, how do you do it? And, um, it is true that they re, you know, and as my assistant's name, like she, she is getting to know Mmm. My, my business in a way that is so empowering. And here's what else is really neat. Tell me if you experienced this once you started letting your VA's, you know, really I think take ownership of their part in the company. That's how I see it. It's not like take over these tasks. Yes, it is taking over these tasks, but it's also really taking ownership in what we're creating together.

Heather Shea: 05:08

Um, heck yeah. It's culture. Like they're a part, they're a part of this. We're a team. Um, and here is like the coolest advantage. Um, so today I have, we had our, our team huddle, uh, our meeting and I started doing, like in the middle of the meeting, I started like renaming Trello boards. And my assistant said, no, Heather, get out. And I had told her in a previous meetings, slap me, virtually slap me if I start going back into these old habits of not acting like the person who's running my business. And in the meeting they both were like, stop, stop. So they will even get to where they will guard your time better than you will guard your time.

Jen Lehner: 05:51

Oh, that's, that's when you know, things are going well. That's wonderful. So there you've got your VA's managing your calendar, they're managing your appointments, they're booking your appointments. Okay. What other sorts of things? Um, and, and I hear that you're having weekly meetings. That's awesome. I think they're incredibly important. Um, and I will tell it, let's talk about your meetings are that your huddles, um, how long did they last and how do you have those structured?

Heather Shea: 06:16

So we use your front row CEO content planner. That's what we use for all parts of houses. And you were so gracious to send over the Trello board, which is just rocking our lives. So I'm the team huddle. We have a meet, we have meetings on Monday, it lasts 30 minutes tops. We get off at 30 minutes. It's completely timed. Um, because you know how meetings can drag on. So it's 30 minutes. Each of us get 10 minutes. We talk about what went well last week, what our priority is on today and what feedback and or help. So everybody gets 10 minutes for that. And then we use the strategy that you present in the, the content planner, which is where we're batching content, you know, for the, for that 90 days. So that's our Monday meeting. And then like Thursday we'll jump on and just say, you know, touch base and of course, um, you know, using Slack throughout the week.

Heather Shea: 07:09

Um, but you know, once we got the acuity down my calendar down, then we really turned to mastering a

content process. So like you say in your planner, content is King, but context is queen. Like I can even quote you. Um, I love it. So, um, yeah, so, so that is another huge piece that we have stepped into. Um, and it is just, I would say, okay. So we started with the podcast, we said, I'm, I'm doing this podcast and I, my whole idea behind hiring an assistant and what ended up being two assistants was that I wanted to go from having to be the engine of, of the whole production, you know, of getting a piece of content out into the world properly. I wanted to go from being the engine of that to a cog in the machine. I wanted to just be one person working to get it done because I have to be the engine in so many other areas of my business that I really needed a process and a team that was really empowered to handle that.

Heather Shea: 08:20

So we started with the podcast. Um, we built out a Trello board where, you know, for each episode we have a card and we just task out. So they are doing, I went from literally doing everything. I would schedule the entire podcast with the person, send all the thank you emails, record it, edit it, you know, upload it, download it, all the things, make all the graphics. By the time I would get done making a podcast episode, I was so burnt out, I didn't even care to send it to my email list. I was just like, Oh, I'm so sick of this episode. I was like, I don't even care if it sees the light of day. So from literally doing everything to my assistance now, like I, I, um, reach out to a guest. I give it to my assistants to schedule, I record it, they do all the show notes, they transcribe it in Timmy, we turn it now into a blog post. They SCO it, they load it in Libsyn, they do all of the administrative tasks. They tag me to review. So I do look at, you know, like their, um, you know, the show notes and the, uh, the blog posts that, uh, my assistant, Melinda writes and I just show up. I meet with my, my guests, I interview them. I really focus on being able to dive deep into that person's work. I, in other words, I get to do what I'm actually good at.

Jen Lehner: 09:44

So, so, so then when you walk into your office and like, you know, like you guys have had your meeting, you're

being really strategic with your content, your podcast is your ankle anchor content, chop that up, you know, a hundred different ways and distribute it accordingly according to the different platforms. And so now you've got this content that's going out. I imagine this content is now turning into consistent weekly emails. Yes. Yep. Okay. So all of that's now happening. So what I want to know is like now what are you doing more of, you know, as the, as the CEO, as the visionary, like what are you enjoying now that maybe you weren't so much before

Heather Shea: 10:22

actually being engaged with my clients and being able to really be present with them. So you know, a little bit about my business for the listeners who, you know, just to give them some context. I run a life coach training and business development Academy for emerging coaches. And our specialty is intuition. So, um, we specialize in training, energy sensitive, you know, people who, um, you know, kind of identify in the spiritual realm who liked to bring that aspect into their coaching. Um, we train people on how to do that and we have, you know, research based curriculum to do so. And one of the things that I wasn't able to do because I was so busy doing, you know, all of the things in the business was to focus on one really being in deep relationship with the people who want to get to know me better, um, which does nothing but drive enrollment, right?

Heather Shea: 11:14

Like it's been, it's just naturally happens because I'm able to tend to my audience, um, and really be there and support and get to know the people that are opting into my list. So, for example, one of the things that I'm able to do now that I would never have had time for was I do loom videos. Um, I don't know if you guys have ever heard of that tool, but it's basically video, email. Um, so I'm able to do more loom videos, which has led to so much more natural and organic, um, enrollment conversations and um, really just kind of the meat and potatoes of my business. I'm able to now focus on, and I'm the person who can do that loom video, right? Like I'm exactly like I'm able to actually do the things that only I

can do. Um, and another thing I've been able to focus on, which is soup, it doesn't sound, this doesn't, when I'm about to say doesn't sound sexy, but to me it is like this is a huge value to me because it adds so much value to my clients is I am able to research content and put together really robust, um, you know, like the certification. Uh, my certification course is really robust. It is so cohesive. It all interlocks, all the modules go to, you know, it's just, I'm able to really produce and create what I, what I envision in my head because I have the time to do so. And the energy to do so.

Well to me that, that's like the sound bite for this episode because, because I think that, I mean that, I mean that's it that really kind of gets to the heart of it and, uh, is that we want to all be able to do that. Like we went into doing whatever it is for a reason, but you know, all those other tasks pull us away from that. And when you are able to really dive deep into that thing that you're passionate about, it like just feels so good, you know? Mmm. But just from a dollars and cents or time management perspective or a time efficiency perspective, I love that you said that you're able to do more of these loom videos. And so, you know, just to, um, expand on that. So like Heather is able to record herself talking to any prospective, new member or client.

I'm looking them in the eye personally. So it's not like saying, Hey friends, uh, today I want to talk to you about blah, blah. It's, Hey cat. Hi Catherine. You know, how, how are you doing today? I'm just wanting to reach out to you to let you know whatever it is you say, Heather, I don't know. I know that you're able to turn that camera on with a click of a button and now because it's a numbers game, you can talk to 20 perspective new people as opposed to, you know, if you were producing and doing all the things from your podcast that day and having to worry about your social media management and the email and you know, your calendar and all the other things. Um, you just, you know, literally would not have those hours to do the loom.

Heather Shea: 12:23

Jen Lehner: 12:40

Jen Lehner: 13:28

Heather Shea: 14:11

Yeah, there's absolutely no way I would be able to do it. And I think we really underestimate, um, you know, you hear people talk about revenue producing tasks. I thought I knew what that meant. And then I got two assistants and I figured out what that really means. And what that really means is there are really important things that only you can do in your business. Only you can do them. And I'm not even like, it's not even like, well, somebody else could do them, but they wouldn't do them as well as, you know, I'm talking about only you can do them. And when you start focusing on those things, everything gets easier and you cannot do it without. I, you really cannot. And I wish that I would have pulled the trigger on getting help and support and being open to getting help and support a lot earlier in my business.

Jen Lehner: 15:04

Well, what, you know, what enabled you to do it now? I mean, what, you know, especially like the trust part, uh, with your inbox in your calendar. You know, that's a pretty big leap.

Heather Shea: 15:15

Well, I think I, you know, I think having a framework, I've never hired anyone before in my own business. I actually used to work as a career coach in recruiting firms. So I used to do interviews all the time for our clients, but I really just didn't have a process. But when I used your program, where you gave like those steps and my husband and I sat down and I said, I am going to do exactly what Jen said because I know that, you know, I'd seen, I see Mika in your Facebook group and I just see how well it works. And so I'm like, it is time. Like I, I at least have to give this a shot. And I think in my mind too, I was just ready to go pro with it. You know, look at, think about the aspiration you have for your business and ask yourself if you are going to get there without a team, the answer is probably no.

Heather Shea: 16:06

So with that being said, you know, you're either going to, if to myself, I just thought I'm either going to do it or I'm not gonna do it. So having that realization and then I think



having the system, you know, in the structure that you gave was really helpful. And it worked like a charm. We had, I posted the job, um, on the website, online jobs pH that you recommend. And I think within three weeks we had two assistants. It happened that fast and one of my assistants and who's in the Philippines, she's full time now. And then my other assistant, I've kind of brought them on as as assistance. But then here's another neat thing about hiring awesome people is you get to see their skillsets. Everyone kind of has something. That's what they're naturally good at. And my other assistant, Melinda, she's basically now a copywriter and a content, a production specialist and a content manager. Oh man, you're lucky though. I lucked out, man. She writes copy. Here's another thing that's neat about, um, about hiring, like getting a team, getting people into your team, trusting people, cultivating people, empowering people is you will find out really quick that your team does things way better than you do. Melinda writes better copy than I do sometimes. Like, you know, I thought I was so good at that. Like, no, you know, like other people really do have so much to bring to the table.

Jen Lehner: 17:39

Yeah. I remember the first time Nika, um, she offered to do a video for me. I wanted it for a live event. And I had this idea right before our retreat that I wanted to do this, like of all the attendees, you know, from a couple of years ago and like to show how far they've come. And I just sort of threw that idea at her and I'm like, I was thinking out loud, I'm like, Oh, I wanted to do this video and it was going to be like this. And I'm like, Aw, I gotta leave on the plane tomorrow. I'm not going to be able to get it done. She's like, well, why don't you let me take a stab at it? And I got to the retreat and um, she sent it over to me and uh, and I played it and I just wept. I literally did, I just said, and she had been with me at that point already a couple of years and I just was like, what?

Jen Lehner: 18:22

You know, it really, it was like a whole, like a whole new, a whole world opened up for me at that point. I'm like, wow, wow. I've really been limiting. I've been limiting her

because she's been doing all this stuff. I had no idea. You know. So really a lot of things changed for us at that, at that time because, you know, she's so incredibly talented and creative and um, and had skills I didn't even, I didn't know about because none of the work that we were doing at that time, that was sort of in her on her day to day and monthly, you know, task lists. None of it was yeah. Editing or video production, you know, I had somebody else doing that stuff, sort of a contractor who I use as needed. Um, so now, you know, and she likes doing that kind of stuff cause she gets to express her creativity. So it's a win win for sure.

Heather Shea: 19:08

Yeah. And I think that's, that's a really neat point you're bringing up because you know, like you had mentioned earlier, um, people do struggle with, what am I going to get? Where do I start, what am I going to give them? And what I would say is focus on ho, you know, don't focus on the tasks so much. That's going to come focus on committing to hiring a really great person. And then from there you will build your system of running a team. You will build out your Trello boards or you know, whatever system it is that you use, and then you'll start to tackle things. So, you know, to give like nitty-gritty examples. Um, next week we have my assistance going into my Canva and managing all of the images. Like the, this is hundreds of Canva graphics, right? Just in there, just thrown in there like a hurricane.

Heather Shea: 20:03

Hit it. Okay. Like just fricking mess. They're going to go in there and manage it. They're going to do by podcast brand pictures, um, PR, uh, program templates, everything. Just organize the whole thing to mimic our Google drive system. So now all across our systems, everything is organized the same. Another thing they're doing is they're going into my, uh, Simplero I use simpler for my email and my course management. And you know, you upload a picture in there, but if you didn't rename it when you downloaded it to your desktop, it's just this long string of, of numbers, which makes it impossible to search for relevant images. Right.

Jen Lehner: 20:43 So I remember that from some player of my Simplero

days. Yep. So you can just go

Heather Shea: 20:48 in and re rename it and then be very intentional with,

okay, here's my, um, you know, my intuition one Oh one course. So we'll put into it one Oh one, you know, main header and then everything that has to do with that core says Intuit one Oh one. Right. So now everything is just easy, easy, easy. Um, SEO is another one. Uh, all my blog, I haven't taken the time really to do it. Super duper duper good job with SEO and my blog posts, that's something they're going to do. That is something I would never get to. I haven't gotten to that in the six years I've been in business. I mean, it's kind of done. So again, these are things that when I was sitting down to hire a VA, like not on my mind, like at all, I, my candle was a mess and that wasn't even on my radar. You know, it's like that's the least of my problems. But when you get the support you need, your whole business starts running like a well oiled machine because you have people that can tend to those aspects of your business that when you, when you start getting them tended to, you realize how important it actually is and how much easier your life would be. Um, if

Jen Lehner: 21:59

Yeah. It's so funny because one of the main, you know, when people find out that I have this program that teaches people how to hire and train virtual assistants, one of the main things people push back with is like, ah, I don't even know what I would give to them. Like, I don't, you know, I don't even run my business in a way that I know what I'm doing on any given day. Um, and, or, you know, we, we tend to have pieces of paper and sticky notes and our own weird ways of like doing things. And sometimes we might have to go, we do things like maybe in a very unconventional way to, uh, I don't know, you know, how you just, we rig stuff and in all right. And then the thought of like, wow, how am I going to bring somebody into this chaos?

those things were taken care of.

Jen Lehner: 22:42

Um, but then what happens is it's just exactly what you said. Like you start off and that's how I teach people to like start with the first things they want to get rid of and let those be the first things. But, but then pretty soon, I mean, the list is never ending because you know, you take, so you know, you start with these things, then you move to the organizing your Canva account, then doing all the SEO and then renaming all your files and Simplero. And then the next thing that you decide to do is you realize that maybe your, uh, you'd like to explore Pinterest. And so you buy a Pinterest course for your VA and let that VA learn how to do it.

Heather Shea: 23:23

It's funny. Melinda's doing Pinterest. I can't believe you just said that. Yeah. She acts like I want to do Pinterest. I said, okay, go ahead. She goes, do you know, should we get on Pinterest? I'm like, girl, I am not on Pinterest. And she's like, I love Pinterest. She goes, watch me. Watch me. Watch your, uh, watch your hits soar on your website. I'm going to do it. So again, like that's, that's so cool, right? Like you get to leverage interest and the talent of your team. But I'm laughing like as you were talking about how a person sits back and goes, what would I even give them? I don't know what I'm doing in my business from day in and day out. That's the point. Like, yeah. And don't you want to stop doing that? Like, well, do you want to stop running your business on sticky posts?

Jen Lehner: 24:08

Yeah. Isn't that like that's kind of the case in point their

bed. And also like,

Heather Shea: 24:15

and, and this is the thing too, like I look at my, my husband just laughs at me. He's like, how am I God? You're, you know, the greatest thing about your personality and the way you show up in the world is also, you know, your biggest curse, which is I don't want anybody cramping my style or hemming me in. And so while it's just me, I'm perfectly happy in my little post it notes on my iPad world because it feels free and it feels good. And most entrepreneurs value that level of freedom. So no, like while it's just you, you're not going to

sit down and think through your processes. You are going to sit down in your office and go, okay, what's the latest fire burning today? Let me focus on that. But when you have a team, you're now really responsible for cultivating other people's professional development.

Heather Shea: 25:02

You know, helping them step into being a better professional. And also really, you know, you want them to have buy-in in your business. And I have found it so refreshing and such a blessing. That gift of what I felt was a constraint. Like the constraint actually feels good. It feels good to me that I can't just write things on a sticky note anymore. It feels good to me now that I can't just download things on my laptop and my husband, cause he also works in the business too. A couple of days a week. My husband and my, my team can't get ahold of it. That feels good to me. Now if it's what makes something I wouldn't enjoy, but it's actually really, really, liberating to have to slow down so that I can speed up ultimately speed up in the business.

Jen Lehner: 25:49

Oh yeah. Well back to the trust issue though, because I think people are gonna listen and they're going to be like, yeah, I am not about to hire someone and let them into my calendar and my email. So how were you able to feel that level of trust from the, from the get go?

Heather Shea: 26:06

Um, so baby steps, you know, acuity is, I gave them all like you taught us to do last pass access. So if I, you know, not that this crosses my mind with Anna Melinda anymore now, but I was certainly terrified as well. Um, and I set them up where to, where all of the software applications they have in my business they have through LastPass, I could, I could literally click my last pass right now and revoke access to everything they have in my business if I wanted to. So that really helped me calm down. You know, I am still in the driver's seat of, even though they do have, you know, access to that, um, I can revoke at any time. Um, and I also didn't just hand them the world to begin with. I started out with one software and then I saw, okay, wow.

Heather Shea: 26:59

The, the really responsible tasks, like with an, um, I just gave her enough responsibility, not that if she didn't fulfill it, it would be disastrous to my business, but enough to see if she could handle it. And she was on time, every assignment, checking things off in Trello. She was even sending me messages saying, Hey Heather, you forgot to send me this thing. You know? And so I thought, well, well she's doing really well with the authority that I have given her. Okay, let me give more. So I think, you know, for us to approach it, thinking it's a, it's an iterative process really helps us, um, gain trust in the process, but also ourselves and knowing that we can have clear eyes on what we give to our co to our assistance, you know, cause you want to give them rope but you don't want to give them enough rope to hang themselves. For me, it was ultimately like, do I trust myself enough to run a team? Do I trust myself enough to, to make these judgements and move forward as a true owner of this business? So I actually really think it's, it's trusting yourself more than it is your team. Really.

Jen Lehner: 28:03

Yeah. Well that's a good point. And I think that, um, and don't you think, and this was a big part of why I put this in our process is that also is that when you, when you go through, um, the process, there's the, there's so much put in there that sort of weeds people out that by the time you get to the finish line and you ever even interview somebody, you've already, you've really vetted out a lot of people who would have been a waste of time, uh, and not right for you. But then you know, you didn't hire anybody until after you put them through, um, a one week trial period

Heather Shea: 28:43

grass. So that's Oh man, that's such a good point Jen. So I did. Yeah. So in the program when you said give them a task, um, I did that, I used the job like how you wrote to set it up. So basically you say, here's my, like I love how you had it on there. You said tell them about your business. So I said, we are a life coach, training and business development company. And it was a long post

to like a true job application. This isn't what just like, Hey, I need a graphic designer like you see on, you know, fiber or it was I PO, I had a job description. This is a full time, you know, or part time depending on, you know, you don't have to say it's full time, but you know, this is a serious position. This is a serious business.

Heather Shea: 29:26

This is what these are your responsibilities and before when, so when you apply, I had um, a PDF that I had them convert over to, you know, design, um, this ethical decision framework that I have. It's like an eight page. So when someone applied and they did not submit that a document with it, I messaged them back and said, please go back and reread and follow instructions. And if they resubmitted it with the document, then they would be a candidate for an interview. And if they didn't, well that just shows you what kind of, you know, the level of VA I would've gotten. So, um, yeah, I think, I think I got, I found two really great assistants within such a short period of time because my betting process was pretty stringent.

Jen Lehner: 30:16

Awesome. Uh, and you, I don't give them that second chance with no, no, but I mean that's the beauty of any kind of process or system. You make it your own. I mean, maybe I missed out on some really good people because I didn't, I didn't send them that message and say, Hey, you know, you didn't go back and read. I, um, I,

Jen Lehner: 30:34

yeah, but I think that's perfectly fine. You know, you had to do it, you got to do it your own way and what feels what feels good to you. But, well, Heather, thank you so much for spending this time with me. It's always fun to, to me. I mean I can just, I can talk to people all day long about how they do their workflows and how they, um, how they run things behind the scenes and especially as it relates to working with virtual assistants obviously. Cause that's, that's definitely something I'm very interested in. But, but I really appreciate you sharing this with our audience. I know it's super helpful for them and uh, and yeah, so thank you.

Heather Shea: 31:10

Well, Hey, I have to thank you because I, and I mean this, I'm not saying this, you know, I'm not saying literally here when I should be saying figuratively or metaphorically. I mean I literally, you know, if you look at my Trello boards, it is all the systems that either you have put in place or the suggestions and the feedback from the, you know, the VIP Facebook group, different received CEO, a Facebook group, and also now this insane planner. I am literally having my assistant Melinda, who is local to me with an on zoom. We are having a huge planner party on Monday. I'm going to take, yes, you gotta totally tag me. So thank you for, thank you for putting this all together and helping me love my business again.

Jen Lehner: 31:59 Aw, thanks Heather. Yeah.

Jen Lehner: 32:02 Links to all the resources mentioned today. Along with all

of the show notes, can be found at jenlehner.com/heather and if you'd like to connect with Heather, you can find her heather@heatheraliceshea.com and that's spelled her last name is S, H, E, A, heatheraliceshea.com and if you'd like more information about front row CEO, head over the

front row, ceo.com see you next time.