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SPEAKERS

Robin Carberry, Britney Gardner

B Britney Gardner 00:00

B Britney Gardner 00:08
All right, Robin, I am super happy to have you on the know like and trust show.

R Robin Carberry 00:13
I am so excited to be here. Thank you. Thank you so much for asking me.

B Britney Gardner 00:17
So, for our listeners, I first met Robin, maybe maybe a little more than a year ago, she was one of the coaches in the program I was taking on building self liquidating offers, and I've more or less stayed in touch with you, Robin, and I've just I've loved seeing all of the things that you're posting the products you're putting out. So I'm actually really excited to hear how this interview goes. And just to kind of dive in.

R Robin Carberry 00:44
Sounds good to me.

B Britney Gardner 00:45
Well, cool. So um, you have a product called Onboard Like a Boss.

R Robin Carberry 00:52
That's correct.

B Britney Gardner 00:53
I love that title, just in general, like, let's call it what it is, let's say that very obviously. But what I really was hoping to kind of pick up, you know, flesh into today a little bit is how the onboarding process can build or, or kill your know, like and trust factor. And, and I know you have some opinions here. So I'm actually really excited to kind of just jump right into this topic.

B Britney Gardner 01:18
So I love this direction, Britney, because when I created Onboard Like a Boss, that wasn't really the thing that was in front of my mind, necessarily, it was really more about making the onboarding process easier for service providers and coaches. Because I know so many people, and it would shock you how many people who have been in business for a long time are still scrambling around when it comes time to onboarding, they put all this effort into their sales pages, and their funnels and their all the other things that the sales calls. And then when it comes to onboarding, it's just law. So I put this program together. And then I realized that it was an incredibly effective tool for building trust and building a client relationship. And I hadn't even really thought about it that way before, which, of course, was an adult moment. But

B Britney Gardner 02:13
I love those moments.

R Robin Carberry 02:15
It just, it just starts everything off on the right foot in so many different ways. You look like a pro or as I like to say you show up like a grown up. And your clients appreciate that. It's it's just makes the whole process easy and simple for everybody. But it builds trust, because the very first interaction you have once everybody's agreed and said, Hey, we're gonna work together, it's gonna be awesome, it's gonna be so much fun. The very first

interaction after that is professional and put together. And again, you show up like a grown up.

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Britney Gardner 02:54

Like how you say, showing up, like a grown up. And I think I think that part right there is really important because you're right, we do put a lot of attention in, you know, our social media and having a funnel that not only looks good, but sells well. And then, you know, I would imagine that this happens pretty often, I've certainly experienced it as, as a client myself, you get like, a plain text email saying, hey, we'll talk soon, or something like that. And you're like, Oh, okay. And to me, it's like an expectation dash. And that's obviously not going to help build up that know, like, and trust factor. But, but beyond that, and, I don't know, I've noticed this with both really like entry level products. And then also like really high end, you know, service options, when you're investing money in somebody else's world, whether that's, you know, \$27 for an entry level product, or whether it's, you know, 2000 4000 or what have you for more of like a one on one or a high end high ticket experience. you've invested something of yourself and for everything to look so pretty and feel so polished and feel grown up, as you say, at the beginning and then just like drop off to like, you know, that first email you sent on your Yahoo account 25 years ago, it just feels weird.

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Robin Carberry 04:14

Right, and and it, it's, then all of a sudden, the thoughts come rushing in, and I've I've been on both sides of this thoughts coming rushing in? Did I make a mistake? Am I gonna hear from her again? What am I going to hear from her again? What is this even gonna look like? Do what are is she going to meet any timeframes? All of a sudden, something that you were super excited about comes something that you're questioning? And that's certainly not a good way to build trust.

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Britney Gardner 04:40

Yeah, not so much. Those those questions are probably one of the easiest ways to to kill trust.

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Robin Carberry 04:47

Exactly, exactly. So So instead of putting yourself in a position where on the service provider side you're saying, oh, oh crap. Now what now? What do I have now? What Do I need to, I need to get this and that and this and that and make this thing happen. And

you're freaking out and scrambling around trying to pull things together. If you have a process, if you have a system to onboard your clients, it's very, very simple for you to say, okay, push this button, put this thing in, check this, these things off the list and that, you know, you've covered everything. And then you can tell your client before you get off the call after she's agreed to work with you, okay, this is what you can expect. Why? Because you know exactly what she can expect. So the process starts right there before you even end that first call. This is what you can expect to receive for me, if you have any questions, let me know. And then you go and you start your process, because it is a process. And it's a process that you know, when you're familiar with and you're comfortable with.

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Britney Gardner 05:49

So like when you're when you're talking about that process that helps people feel comfortable, I think back to my first real job, quote, unquote, that I had, like, way back when when I was in high school, I was a server at like a local like, pie shop type restaurant. And like, I got hired, they were in desperate need of help, they probably shouldn't have hired me, I was an awful waitress for the record. But like, they handed me my uniform, like my shirt and an apron and said, we're either black pants or khakis. And we'll let you know when you're scheduled. Yeah, and it was like, so low tech, obviously. But it was also like no muss, no fuss, it was like, here's your uniform, we'll tell you what, that you're scheduled. And it was my first job. I didn't know what I was doing. I was definitely in like, the No Man's Land of questioning everything and feeling very insecure, I had never worked for anyone before. But just knowing exactly what was expected of me wear this uniform wear these pants and show up when we tell you to was enough for me to be like, Okay, well I can do this, I can take that next step. With employees with like, corporations, you know, they have these things kind of all all dialed in. But you know, as as one off service providers, or even people running digital info product businesses, it's like, we kind of forget that we need to have these processes.

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Robin Carberry 07:09

Well, right, because we're so focused on on getting the sale, for lack of a better way to put it, that we just are, we focus on that 100%. And then when it comes to the other side, it's it's running around like a chicken with your head cut off, which it doesn't have to be that way, that's the crazy thing. It doesn't have to be that way, it's so simple to actually have a process. And what's even better than that is that nine times out of 10, your client doesn't even know what is required for you to do the work that you have committed to do for them. So whether it's building a website or writing a sales page, or you know, entering into a coaching relationship, they they don't know what they don't know. So for you to show up with all of the things that they need to deliver to you what the schedule is going to look

like how they should expect to communicate with you setting boundaries by these are the my hours. And these are the ways I communicate. And this is the scope of the project. And you know all those good things that go into things like contracts and confidentiality agreements and scope of work, and checklists for what's involved in the job itself. That all makes your clients job, so much easier to get to you what it is that you need. And it makes it easier for you to deliver it without delays without concerns without problems. And boy, do you make your client's life easier, they are pretty gosh darn likely if you deliver all the things to refer you to other people, because it's been a great experience on top of receiving great deliverables.

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Britney Gardner 08:49

You know, something you said they're kind of sparked an idea. You said, If you make your client's life easier, and I'm not disagreeing with you, obviously, I agree with that. But something that I've experienced personally, after hiring someone is getting like a barrage list of things that I need to accomplish, like do this and then do this and then do this. And in my case, in that particular time, I was like, oh, oh, I have like a whole bunch of things I could do before we can even start this process. What are your thoughts on that? Is there like a specific way you like to onboard people? So that's like a little bit of time? Or do you like giving them all of the information all at one time?

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Robin Carberry 09:26

Well, I think part of what you're talking about needs to be handled on the front end. And when I say on the front end, it's in terms of your discovery call and your process for vetting clients. Because sometimes somebody will hire you to do something, and maybe you're not actually ready for that work to be done. If there's so much work that you need to do to be ready to have your website designed or have your branding done, or have a you know, a social media plan. Put into For you, whatever those things happen to be, you might think, hey, yeah, this is exactly what I need. But what you need is actually five steps before that. So that part of that should be done in your discovery call process and your vetting process, just to make sure you're not going to dump a pile of stuff on the client, and they're like, Oh, my gosh, I have 10 days of work to do before I can even start working with you. So that's the first thing. And then the second thing I've found over time is that most clients appreciate knowing what's expected from them in the very beginning. And if it's going to cut down ultimately on the amount of communication that's required, the number of emails that are required, and then all of a sudden, you're struggling to keep track of all these different lanes of communication, all these different emails, what did what did I provide? What did I provide? Then, you know, if you have a checklist in the very beginning, you can check all those things off, the service provider can in turn check those

things off as they receive them and follow up on maybe things that are missing, it just makes the communication channels that much cleaner, and it makes it that much easier for the service provider to get to work.

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Britney Gardner 11:05

100% I feel like the checklist is such an under valuable, excuse me under valued thing here. Because you can look at the checklist. And you know, let's say there's 10 items on it, and you're only able to do three right now, but at least you know what's coming. Mm hmm,

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Robin Carberry 11:20

exactly. And if you know the project is happening in stages, it is possible for you to break that up into stages, and you just give, you know, okay, here's the deadlines for these things that I need. Keep in mind that these things are coming down the pipe, but you don't need to get them to me right away. So that can help with the overwhelm as well. It's I don't need all these things tomorrow to get to work. But this is what's involved in the project. And these are the timelines in which I need to have these things to keep things moving forward and meet the meet the deadlines.

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Britney Gardner 11:50

So one of the things that we talked about early on when we were scheduling this interview was you were talking about how Yes, visibility is an important piece of everything. And that's where your brand experience starts, of course, but you know, it doesn't end there. And I'd love for you to expand upon that a little. Well, this

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Robin Carberry 12:14

ties into what I was speaking about earlier, in terms of the client experience and making the client's journey easier with you and ending up in a great testimonial or a referral at the end of the day. Instead of sia, thanks. nice knowing you. So visibility, of course, is, again, part of the equation that we all focus on, we focus on what our brand looks, sounds and feels like we focus on communicating and connecting with people, we focus on giving them value and making sure that we understand what it is they think they need. So we can deliver that but also deliver what we know that they need. But if somebody has that experience with you, and then walk through your virtual front door to have the work done, and you look like a mess, and you don't have it together, then all of that hard work you've done in terms of your visibility just went out the window. So that's that's how those things

connected. It's the experience doesn't stop when you move off of social media and onto zoo, or into emails or into whatever method of communication it is that you're using with your client, that all has to continue. And again, like I said, showing up like a grown up, that helps.

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Britney Gardner 13:29

So when you say it all continues there. And you know, it has to go from social media to see them in a fairly seamless way for you to, you know, get that good experience for your clients for you to eventually gain that testimonial or referral. What are the things that that you've seen people stumble over the most?

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Robin Carberry 13:50

I think one of the biggest stumbling blocks to go back to the checklist is really having a clear laid out whether it's you know, in Trello, and I provide a Trello board with my product. But that's not everybody's everybody's thing. Just being clear about what's required for you to actually do the job that you've committed to do. So you can know how to write a sales page, you can know how to build a website. But if you don't have all those things spelled out to the smallest detail. Yes, I need a favicon. Yes, I need all your branding colors. Yes, I need all the you know the hex codes for those branding colors. Yes, I need access to your to your existing website. Yes, I need images and they have to be in this format. And in this size. You might know all those things as you're sort of cruising through, but you can't expect your client to know those things upfront. So if you don't have all those things listed out spelled out that you can hand that over to your client and say this is exactly what I need. Then you get into this back and forth business. This doesn't right This doesn't fit I don't have access I can't get in. And again, you look like, you don't really have your mess together. It's like love she really know how to build a website, I'm not quite sure, because she doesn't seem to know what to ask me for to make it happen.

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Britney Gardner 15:13

I love that. And I think you bring up a really good point that even if you as the service provider, do you know all the things, and even if you'd rather ask for them, you know, as you need it, just asking for everything in one place, that alone tells your client, hey, I really do know what I'm talking about. And because I know what I'm talking about, so Well, I'm gonna lay it all out right here.

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Robin Carberry 15:36

Right? Exactly, exactly. And, you know, talking about building trust, having an onboarding system for yourself for your business, helps you build trust in yourself, as well, that you are a professional, that you do know what you're doing. So especially in those times, when you're maybe stretching yourself a little bit, maybe you've just increased your prices. Or maybe you're adding on a new service that you haven't done before, even though you know how to do it that you have an offer before. If you have your stuff together in terms of your onboarding system, it helps you be confident yourself and trust yourself that yes, I can do this and I can deliver.

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Britney Gardner 16:17

I love that you just called that out. Okay. So it's one of the things I say a lot of times to my clients or putting together content plans that one of the best ways to kind of move through imposter syndrome, or even lesser versions of imposter syndrome is really just to keep talking about what you're doing. Because as you keep talking about it, you're going to realize, Oh wait, I really do know what I'm talking about. And the onboarding system you create is just yet another extension of that really?

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Robin Carberry 16:45

Exactly, exactly. And it's, and it's proof to yourself, not just that you know what you're talking about, but that you are going to be teaching your client and educating your client throughout this process, too. Because like I said, so many. So many times we hire somebody to do something, because we don't want to learn how to do it. We don't want to figure out how to do it. We don't have the time for any of those things. But we certainly don't mind being educated about the process, and what to expect and what a professional website looks like what a good converting sales page looks like, what goes into those things, why market research is necessary. You know, so many people don't know those things. So when they get educated as part of this onboarding process by this service provider that it builds their confidence to and then you like, wow, look, I taught somebody something that's pretty freakin Cool.

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Britney Gardner 17:40

Well, and then hopefully, you know, a rising tide lifts all boats, right. So hopefully, they'll turn around, and the next time they have something new that they're offering, they can also be like, you know, I really enjoyed my experience working with Robin, she brought me through the process so easily, I always knew what to expect. And hopefully they can turn around and do that for those clients that they are serving as well.

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Robin Carberry 18:00

That is such a good point. And I have learned, I have learned and quote unquote, stolen so many things, from professional experiences, positive experiences, fun experiences, working with other people. And just you know, you can look at something even if it's not exactly what you do, you can look at an experience you have and say, Wow, how can I adapt that for my business to do this better? Because that was just really cool.

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Britney Gardner 18:26

So leading from there, what is the best onboarding experience you've ever had? Oh, my goodness, I know, I'm putting you on the spot here. Sorry.

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Robin Carberry 18:37

No, that's fine. That's fine. It's and it's a question I should have prepared myself for because I have listened to your podcast. And I know that you that you throw this type of question out there, which is a great, it's a great thing to ask. I would say my best onboarding experience was when I signed up for my first high end mastermind. And I was scared to death because I knew that I wasn't qualified to be in that mess. I was stretching myself even to get on the call to do the interview. And the process started with the interview which put me at ease and made me more comfortable. And she adjusted to my concerns and where I was at in my business, invited me in and then immediately made me feel even more at home by sending me information about what was you know, that reiterated all the things on the call and that you know, the contract and the invoice payment and all of that was very smooth, but then it continued on to you know this, here's what you can expect in the first month. Here's when our first call is scheduled. Here's what the group looks like. Come in Introduce yourself. And all of it was just about making me comfortable in a decision that I made that made me wildly uncomfortable, and made me feel like I belonged. And I fit in, along with the nuts and bolts pieces of it as well, like, you know, this is what you can expect, this is what the journey of the year is going to look like. Here, here are the things that we can support you on, here's your access to the course area where, you know, this is this section. And this is this section, it made it very easy for me to move around and move through that entire process. And like I said, I started out extremely uncomfortable. And I and I ended up feeling like I was welcomed, and I wasn't lost, and I wasn't confused.

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Britney Gardner 20:43

You know, one of the things he said in there that was really interesting to me is that you

went from feeling like you're totally out of your depth to feeling like you fit in. And that fitting NPS, I feel like is such an important thing. And I know a lot of sales pages will have that section towards the end. And it's like this, this thing is for you if XYZ and this thing is not for you, if x y, z. And a lot of those sections can be a little snarky, and have a little bit of, you know, sassiness to them. But what you just described is kind of like the heartfelt authentic version of that, like, Hey, I have these concerns. And then you know, those concerns were addressed. But also, because of the rest of the process of bringing you into that mastermind. You you kind of lost that feeling of inferiority and started to feel like, Oh, this is a place where I really can grow.

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Robin Carberry 21:36

Right, exactly. And it's funny, because I definitely fell into you know, I mean, the sales page did have this is for you if and this is not for you if and it wasn't all that snarky, but it was pretty clear. And I was like, okay, check on that. check on that. No, check on that. No, check on that. No, check on that. Alright, I'm doing it anyway. And it was okay. It was okay. Like I always say it's having a conversation doesn't hurt anybody. So, open the door and and see what that actually means to have the conversation even if you know, and I'm totally sidetracking here, but I was literally just running across this, this stat the other day, it's not really a stat. But it's it talks about how women approach. In this case, it was looking for a promotion, or a new job. And how women look at a checklist of things that they you know, if I don't meet every single requirement, then oh, no, I can't apply for that. Or I can't, you know, I can't put in a pitch for that, or I can't put a proposal in for that. Because I don't meet 100% of the requirements. Whereas the dude would be like, check one, check two, hey, I'm in and I'm the perfect fit. Even though they didn't check three through five. It's so it's it's a little bit of that they're going on as well. And and I had the conversation with myself at the time. Yeah. And I say this to myself on occasion. So if I was Dude, what would I do? And that was one of those times where I was like, if I was a dude, what do I do? I would let her tell me I don't fit in, I wouldn't make the decisions for myself, I'd let her tell me that.

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Britney Gardner 23:18

It's so interesting that you bring that up, my husband was laid off last year and he you know, have a drink COVID getting a new job was not spectacularly easy at the time. But there were so many job listings. That just even for me, not someone that was an expert in his field. I was like, That doesn't even make sense. Why would that be a requirement for that job listing. And he just started applying for them anyway. And you know, he ended up getting a great job, the whole process was wonderful with the company that did eventually hire him and all that. But I looked at how some people put those qualification

lists together. And I don't think this happens as much in our industry where we're talking about, you know, masterminds or services that you're providing and things like this, but I do think in the broad scope, a lot of people just put lists of requirements together because it looks good, or it beefs up a sales page or things like that. And you're right, you know, if you if you're hitting the mark on a good chunk of them, odds are it could be a good fit.

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Robin Carberry 24:20

True, and if you know and again, in the sales page realm, if the page resonated with you, generally speaking, and you got down to the end, and it was like okay, two out of three or three out of five. Yeah, you know, go for it. Why not? Because if the rest of it felt like a good fit, then there's a good chance that it that it is a good fit.

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Britney Gardner 24:42

So on the flip side, have you had any really bad onboarding experiences? And maybe if you have like, what did you learn from it?

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Robin Carberry 24:53

Um, yeah, and and I learned that I didn't have my act together as much As I should have when it comes to this particular area, I hired a social media VA to help me show up consistently because that was something that pretty much and I'm not unusual here, I know that when I got busy, one of the first things that went was visibility. So I hired somebody who was recommended by another person. And who I trusted, and I knew that this the person that I hired was doing work for this other person. And so I said, Yeah, let's go ahead, let's do it. And she was like, great. And, you know, she said, Can you give me access to these things? I gave her access to those things. And then she's like, Alright, I'm gonna go do my thing. And I have no idea what her thing actually consisted of. I know, she was putting the content out. And I know, I was happy with what she was putting out. But I had no idea how she put it all together or what her process was or what it looked like. So when she ghosted me

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Britney Gardner 26:07

they're going, huh? How do I keep this up? Now?



26:13

I have no idea how to do any of this. Awesome. That's so cool. So that showed me that if

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Robin Carberry 26:21

I am going to go with somebody else's process, I better educate myself on what that process actually looks like. So I can fill in the gaps if need be, or I can hire somebody else to fill in the gaps, because I know how it works.

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Britney Gardner 26:37

Yeah, no, that's, that's a really good lesson for every business owner. Yeah, unfortunately, those are the types of things I need to learn the hard way clearly. But Don't we all? I mean, you probably would never have realized, because you thought you were doing the right thing. You were hiring someone to help you to support you in an area that you knew that you were, you know, falling down on a little bit, especially when you got busy. You were you were doing the right thing. You were outsourcing something that somebody else could use so that you could continue doing the things that only you can do. And by all accounts, that was the right decision. But the only way you were really going to know that you needed to know what that person's process was by you experiencing a situation where you suddenly didn't know that person's process.

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Robin Carberry 27:25

Yeah, fair enough. I think I honestly was just so freakin relieved to get it off my plate, that I decided just not to think about it. So if I had really thought about it, I would have said, You know, I probably need to know a little bit more than I do right now. But I was, like I said, I was just so relieved not to have to think about it that that was really the path of least resistance.

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Britney Gardner 27:46

I do find it very interesting that you and I both experienced more or less the same problem in the exact same kind of person that we hired because I had the same experience. Several months back, I hired a social media VA. And in my case, it wasn't so much that they did their thing. And it was great. And they ghosted me it was more that they weren't doing it the way they wanted to do it. So when I hired someone to replace them, I created like a mini training program and put it in my membership area for like my other course learning products. And I just assigned that task to the new person I hired and said, here's a little training I put together and you know, if you have your own way of doing things, that's great, but this is how I like it to be done. We can always discuss it if there's a different way

that you like better. And it's worked fabulously for me. So I'm hoping that that means that was the right process.

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Robin Carberry 28:35

What I love so much about that is that you created a training and put it in your membership area. So this is something that other people can who who are in your membership can take advantage of and learn from as well. No, no, I

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Britney Gardner 28:49

have literally one member in it. And it's the person doing the work right now. But you give me a good idea. I could make that available to other people, especially my one on one clients who are eventually going to be doing the same process. That's That's a great idea.

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Robin Carberry 29:03

Well, I'm you know, that's exactly what I was thinking. I was like, Wow, she did sort of like I did with onboard like a boss. She found a need and she filled it First off, and then she made it a product that she could sell to other people too.

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Britney Gardner 29:15

Now you're giving me food for that. I like that. That's what I'm here for. Or I've been this has been great. Do you have any closing thoughts? And also, where can people find you online if they are interested in something like onboard like a boss.

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Robin Carberry 29:30

So closing thoughts I would say first of all, remember that an onboarding system a real system builds trust for your clients and builds trust in yourself. And I would say almost the second part is more important because that helps you show up more confidently and deliver your services more competently. It also sets up you and your client for a great experience. No more 95 emails to try and get one piece of information that saves given time and money, it also saves your client multiple headaches. And then the third piece is that, like I said, an onboarding system saves time and money. And it also makes it easy to delegate. So that person that you've hired on, here's my onboarding process. This person agreed to sign on. Here you go, go run with that. Let me know if there are questions. So all of that said, you can find me on Instagram. At at Robin underscore Carberry spelled car like a car Brr was like a berry underscore coaching. And I love Instagram. It's so much fun.

And Britney, you know that? I see you all the time on there and yeah, we're we're both but yeah, I'm also on Facebook. You can just search Robin Carberry you can find you'll find either me or the dog trainer in Ohio. I am not the dog trainer at Ohio. And if you're interested in onboard like a boss, then you can just get yourself on over to Robin carberry.co slash onboard like a boss.



Robin Carberry 31:13

Perfect. Well, Robin, thank you so much. Thank you so happy to talk to you. And you know, I'm happy to talk to you anytime though. This is true.