

A person in a dark suit is holding a transparent globe with both hands. The background is dark and features several floating digital elements: a smartphone on the left, a laptop at the bottom left, and two tablets at the top. A network diagram with circular nodes containing person icons is overlaid on the globe. The text '10 TIPS FOR GETTING THE MOST FROM OUTSOURCING' is centered over the image.

10 TIPS FOR GETTING THE MOST FROM **OUTSOURCING**

A woman with long blonde hair is sitting at a desk, writing in a spiral notebook. She is wearing a blue shirt and a watch. On the desk, there is a laptop, a coffee cup, and some papers. The background is slightly blurred, showing other people and office equipment. A green semi-transparent banner is overlaid across the middle of the image, containing the text "Daily Huddles".

Daily Huddles

Use Zoom



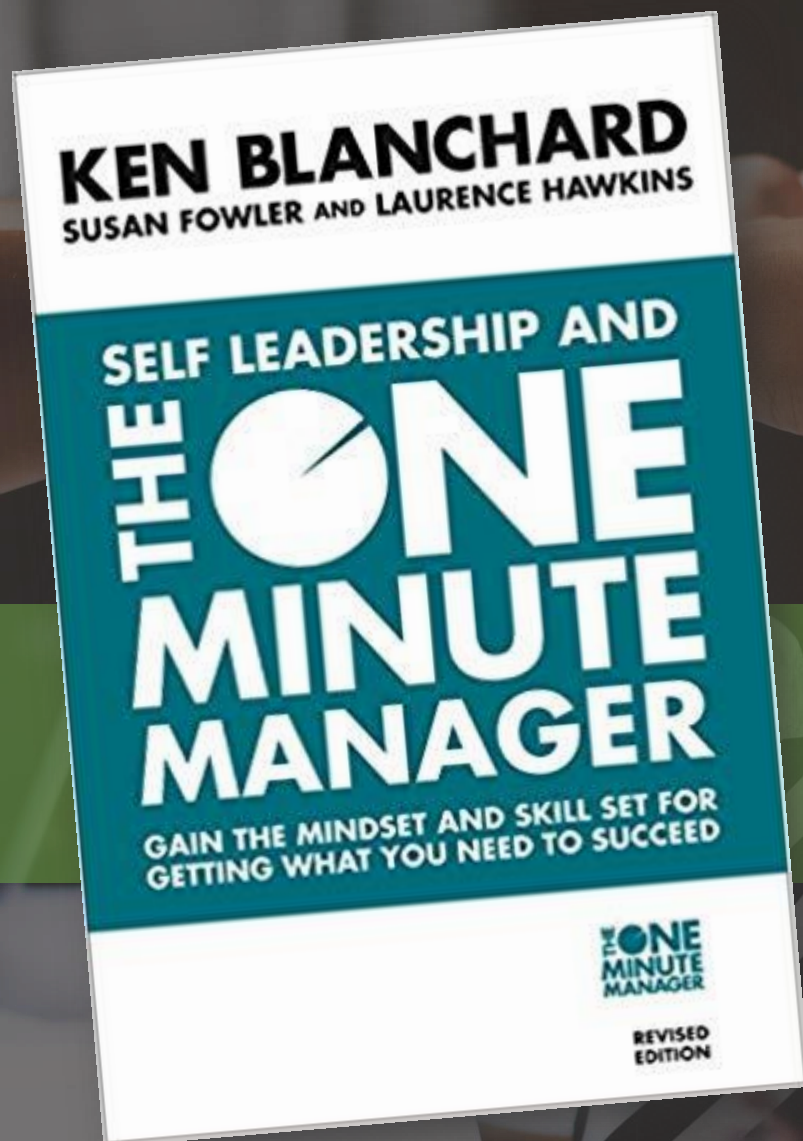
zoom

Records Meetings

Chat reduces email

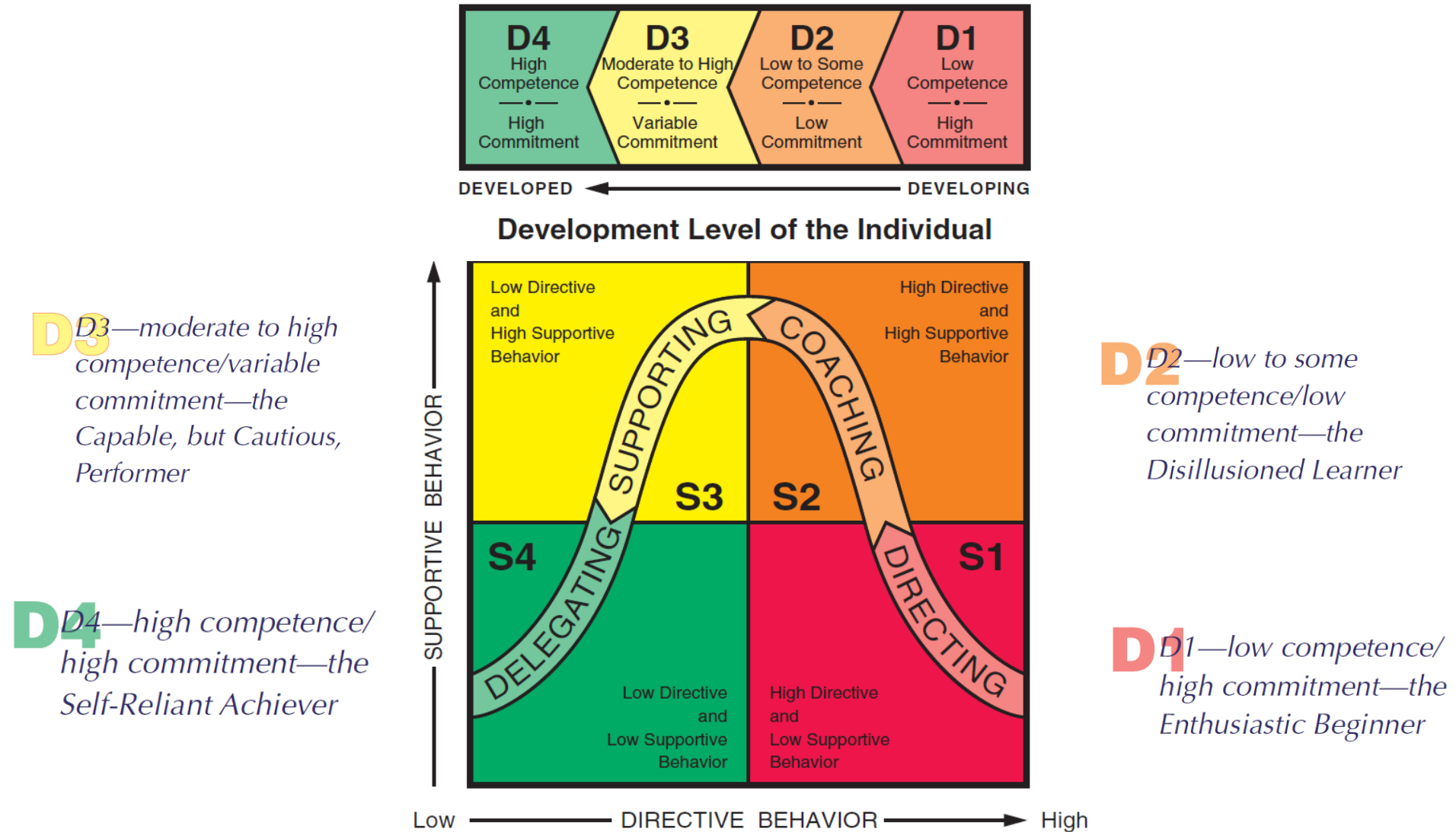
Can screen share with audio
(if you want to share an audio/video content)

Can create groups for
certain communication



Understand Situational Leadership

The Situational Leadership® II Model



Matching Leadership Style to Development Level

S3 are ...

- Asking/listening
- Facilitating self-reliant problem solving
- Reassuring
- Encouraging feedback
- Collaborating
- Appreciating

S4 are ...

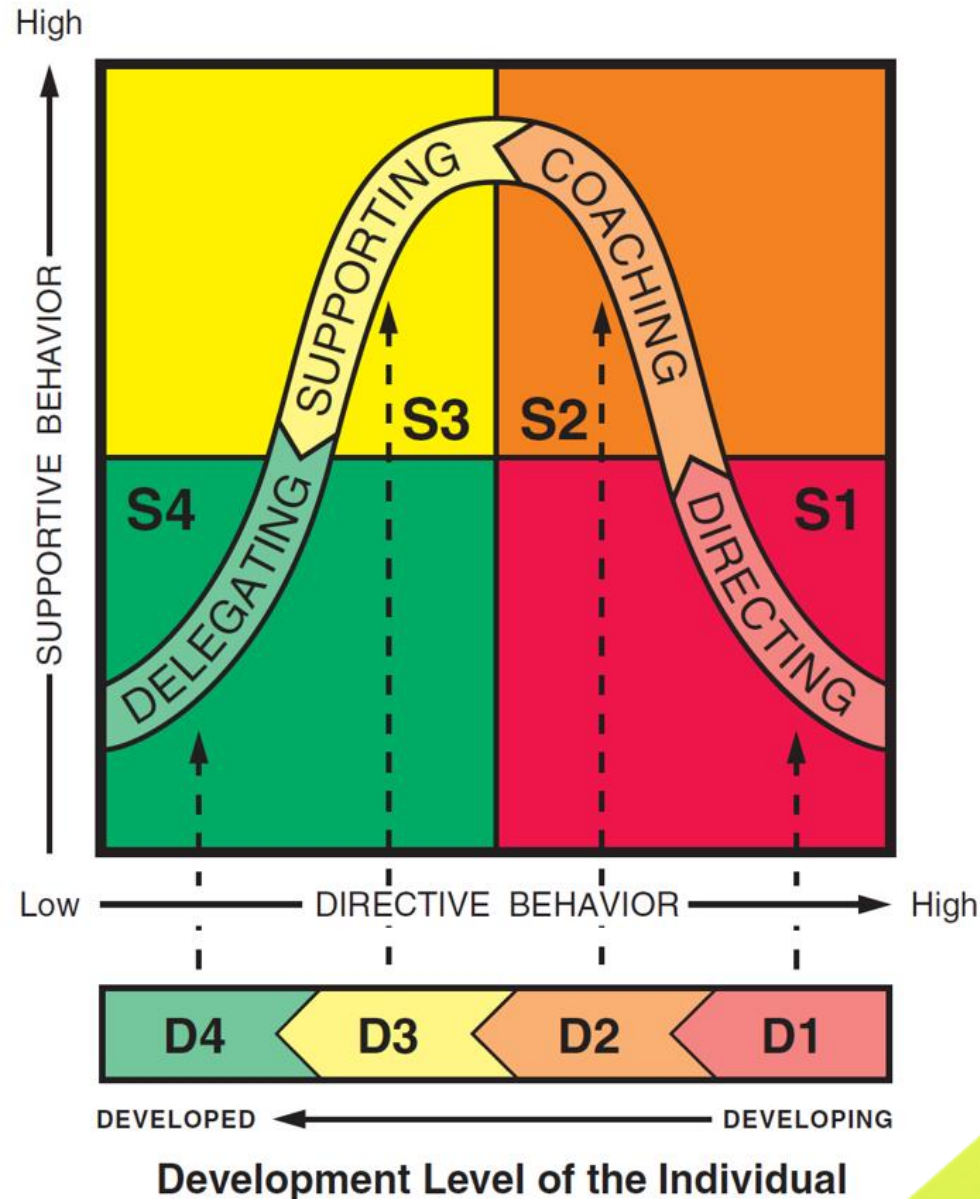
- Allowing/trusting
- Confirming
- Acknowledging
- Empowering
- Challenging
- Affirming

S2 are ...

- Exploring/asking
- Sharing feedback
- Explaining/clarifying
- Encouraging
- Redirecting • Praising

S1 are ...

- Defining
- Teaching/showing and telling how
- Planning/prioritizing
- Checking/monitoring
- Orienting
- Giving feedback



Set Clear Goals or Objectives

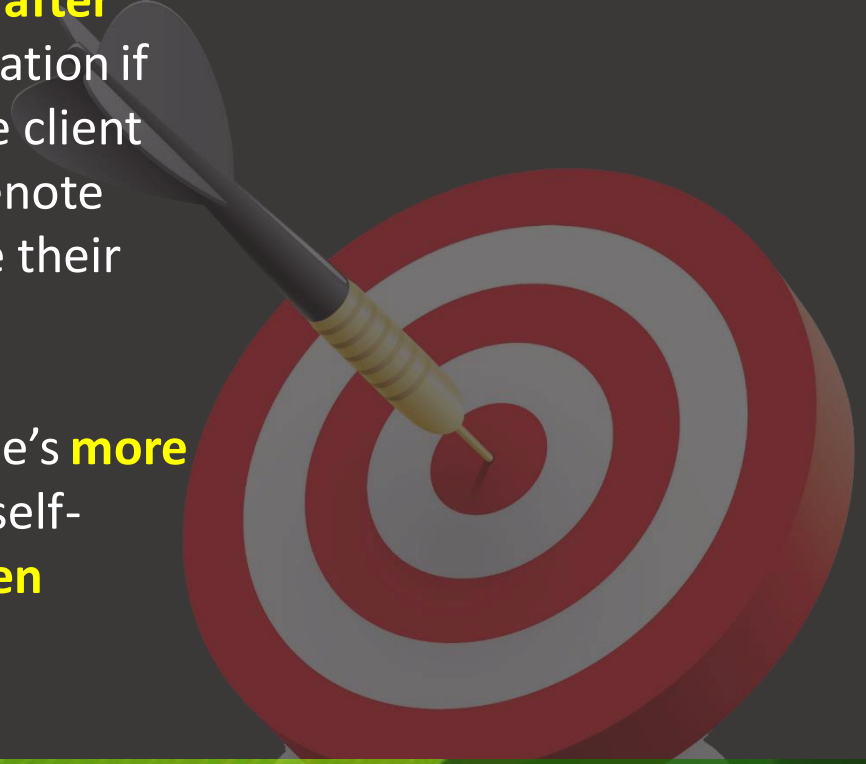
STRAM – **S**pecific, **T**rackable, **R**elevant, **A**ttainable, **M**otivating

- Examples of how others have accomplished the task/goal/skill
- What would you consider average, outstanding or below average performance?
- What resources can I draw on?
- How long do you think this should take?
- In relation to other work, how important is this task?

Example of Clear Goal

Infinity FC – D3 FPA Cat aimed to become **self-reliant or D4** in preparing applications and forms. She asked **two weeks** maximum to attain this **or after five consecutive SOA Prep tasks** with Jabber's help by providing confirmation if she understood the strategy correctly. Cat shared that she also needs the client to provide the final SOA instead of the pre-SOA form called SFN/SOA Filenote same as other D4 FPAs like **Charles** of Oak FP. This way, everyone can use their **time effectively** instead of going back and forth with the planner.

Upon checking back with Cat on our next one on one, she shared that she's **more confident** and can now understand the strategy better and has become self-reliant in doing the task and **is evident based on the feedback we've been getting from the client.**



Example of Clear Goal

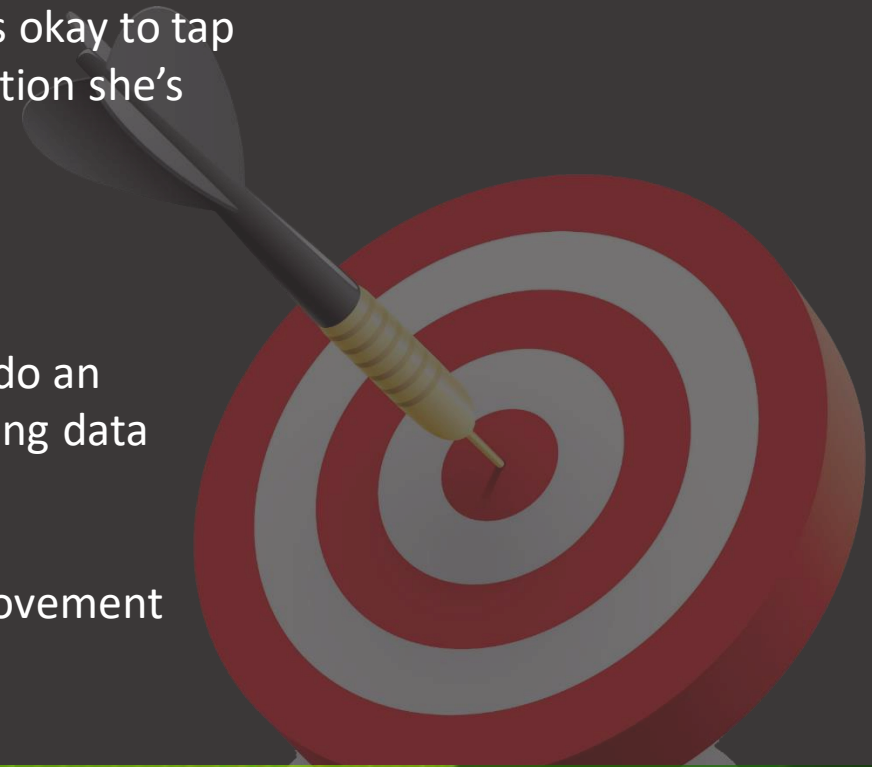
Merideon – FPA Jhoanna shared that she still has some troubles doing **Data Entry in Platform Plus (D2)**.

Jhoanna aims to become proficient and self-reliant on this task and asked if it's okay to tap on the **Announcer team** for help whenever she gets confused with the information she's entering.

She's looking at reaching this goal in a **month's time** considering the frequency.

I communicated this to **Lailani, Team Leader of Announcer**, and has agreed to do an enhancement training with Jhoanna and shared **her best practices** when entering data in Platform Plus.

Jabber just needs to check in with the clients regularly to see if there's an improvement

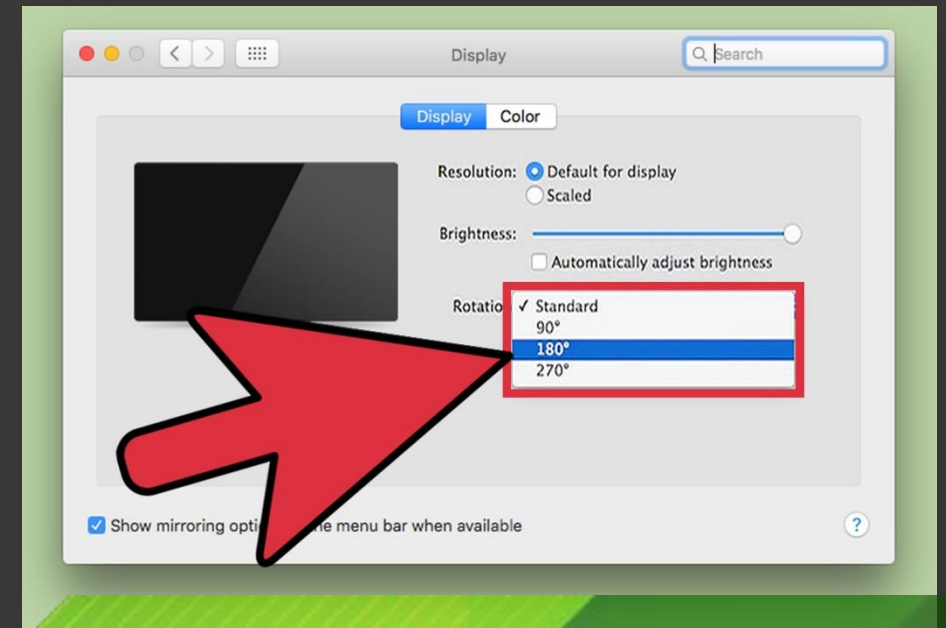
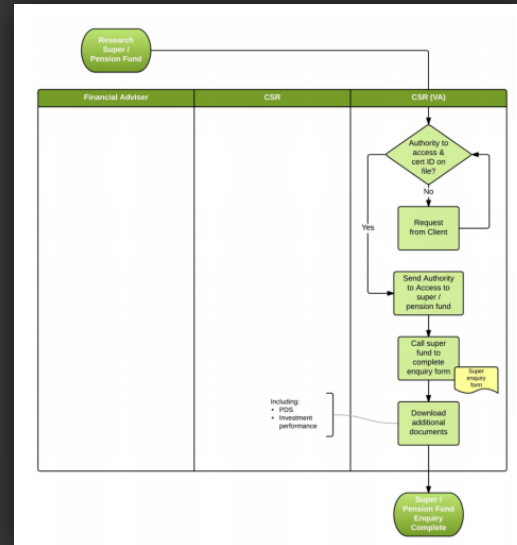
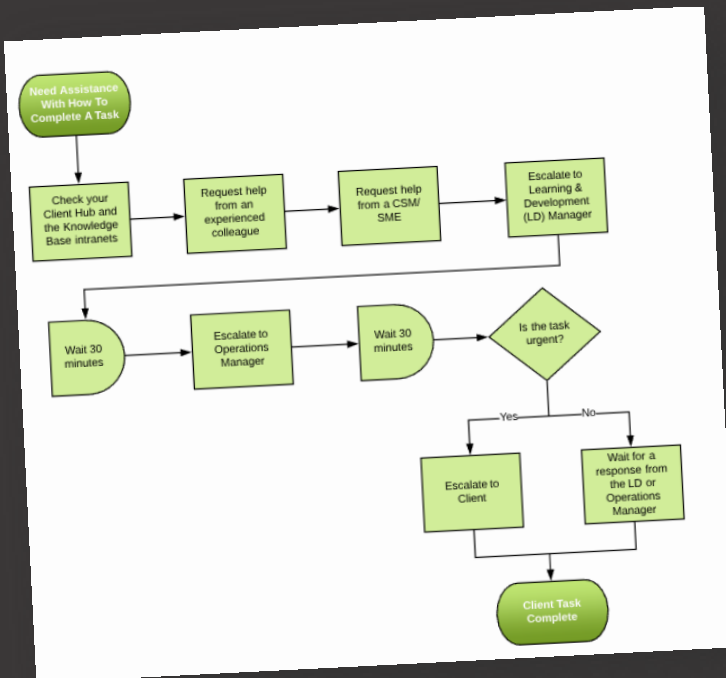


Use Open Ended Questions


Yes means
Yes, No, Maybe



don't reinvent THE WHEEL





 **Sherry Mongaya** is with Linda Bacus.
August 2 at 8:12 PM · 🧑🏻‍🤝‍🧑🏻

My mother was so surprised when the delivery man handed her a bouquet of flowers. She was thinking that there might be some kind of a mistake and she couldn't believe that it's for her. She asked a lot of questions when I arrived home but I don't know what she's talking about and to my surprise, the flowers are from my client, my friends, my family from afar - AMP ADVICE VINTAGE WEALTH AUS. Biggest thanks to Yogita Ramchandani Dudani, Justin O'Donoghue & Stephen O'Donoghue. The longer I work with you, the more I realise that you are genuinely generous, sweet, thoughtful and caring persons. The flowers and your kind messages definitely help her get better soon.
#thankyouVintageWealth#thankyouVBP#thankyoukristina



Treat them as part of your team

Feedback

REFLECTION +

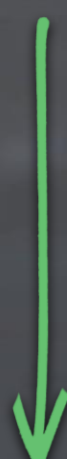
them



you

LOOKING FORWARD +

them



you



Action - who is doing what

Who is managing the relationship?



Frame your questions

“What could we do better?”

“What are the 3 things we need to do to improve?”

SPECIFIC TASK TEMPLATE

Dear <Assistants Name>

Morning. I would like you to start the following task.

Specific TASK – example

"Can you please research venues and in hunter Valley NSW for our 3 day business planning and offsite. We need to look at accommodation for 10 (6 will be twin share) 4 girls and 2 guys other 4 in rooms on their own....."

Clearly define the task

"Can you do this? if not, please advise. Please reply and confirm what you plan to do for this task

(outline in ASANA by creating a project - Use the description section to confirm the objective of the task and the Task list for the different steps, tasks and milestones in completing this project"

- Ensures the understanding of the tasks
- Ask the VA to do planning and thinking
- Clarify if both are on the same page

"This is an URGENT task as we need to confirm if we are going to go ahead by end of the week. Please begin now if possible or after you have finished what you are currently working on . Articulate the urgency of the tasks so they can prioritise work "

Articulate the urgency of the task.

"Spend x hours and then tell us what results you have (so I know you are on track and we will know the timeframe)."

Check in – really important that you set a time limit.

"The deadline for this Project/task is the end of the day AEST Friday x"

Clearly spell out when the task is due.

Connection of Culture

