Free Up 15 Hours Per Week
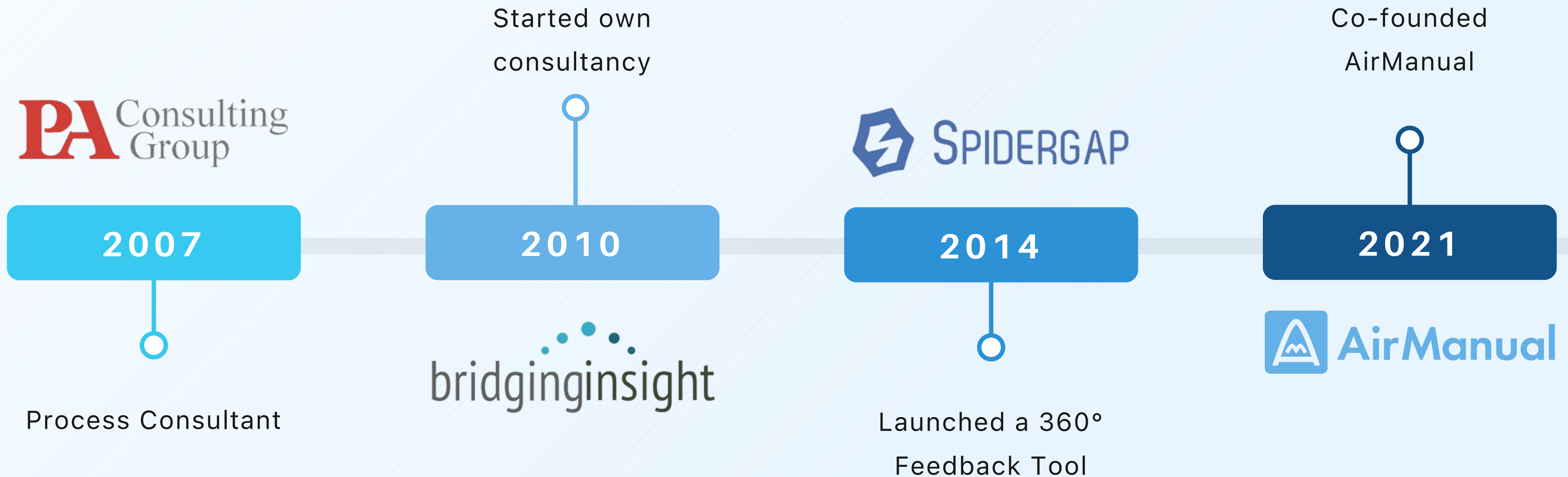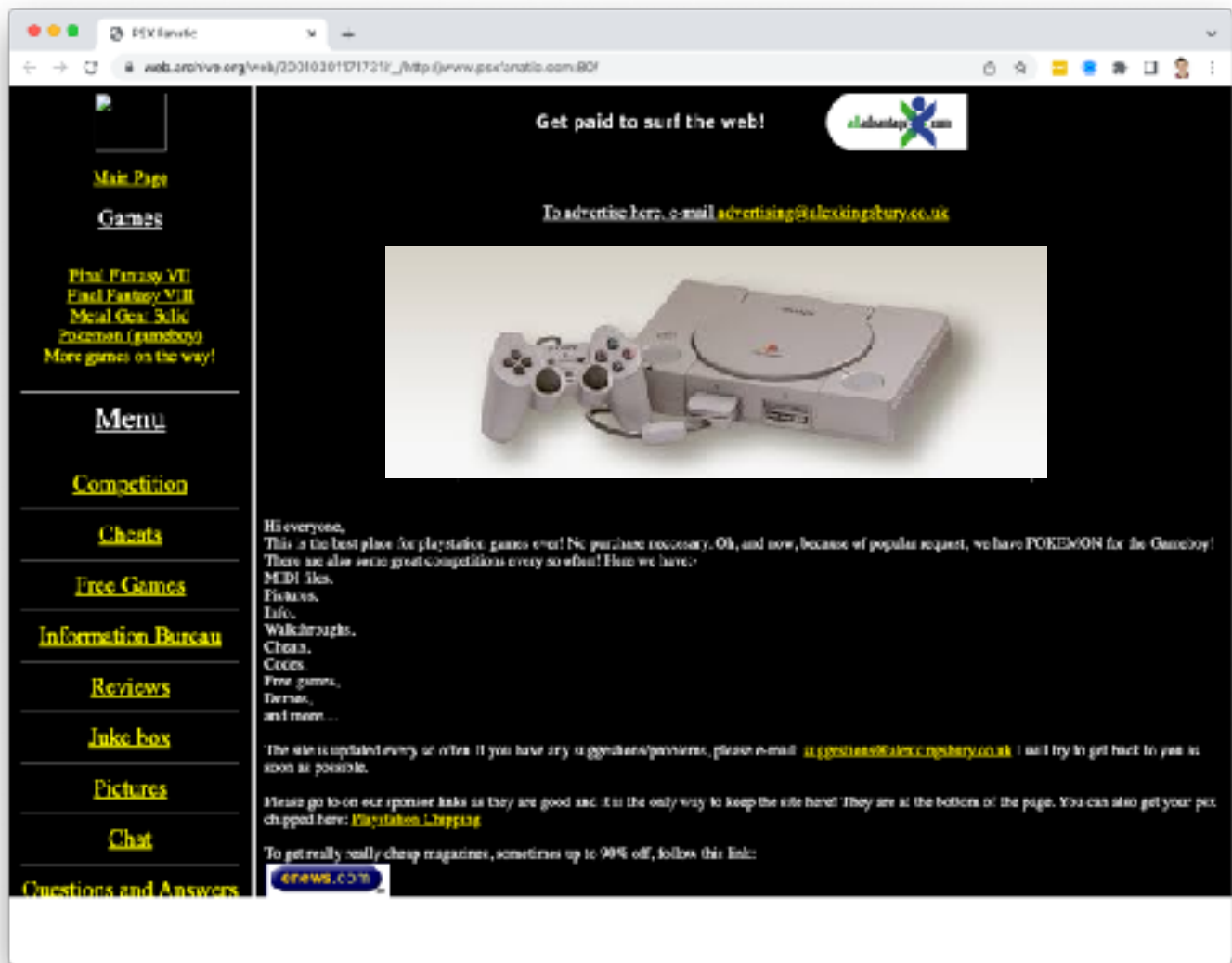
…Get Team Members Onboarded 80% Faster,
and Make Managing Processes Easy!

Alexis Kingsbury
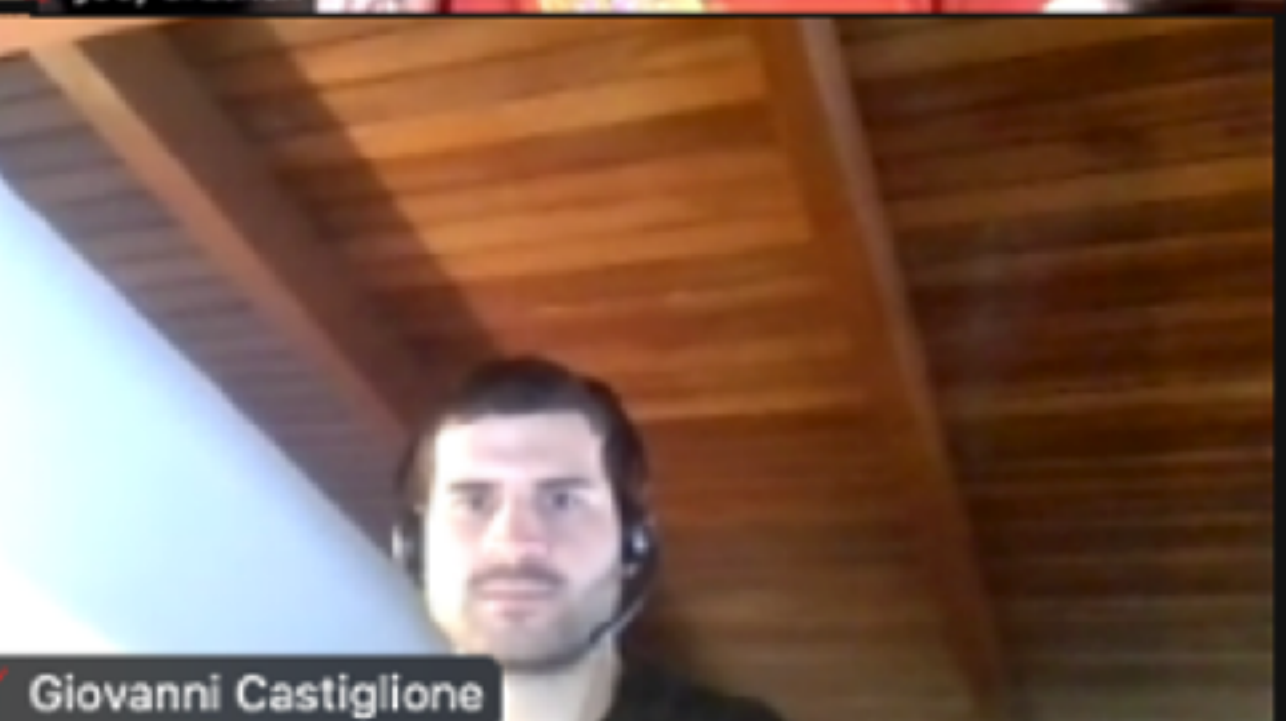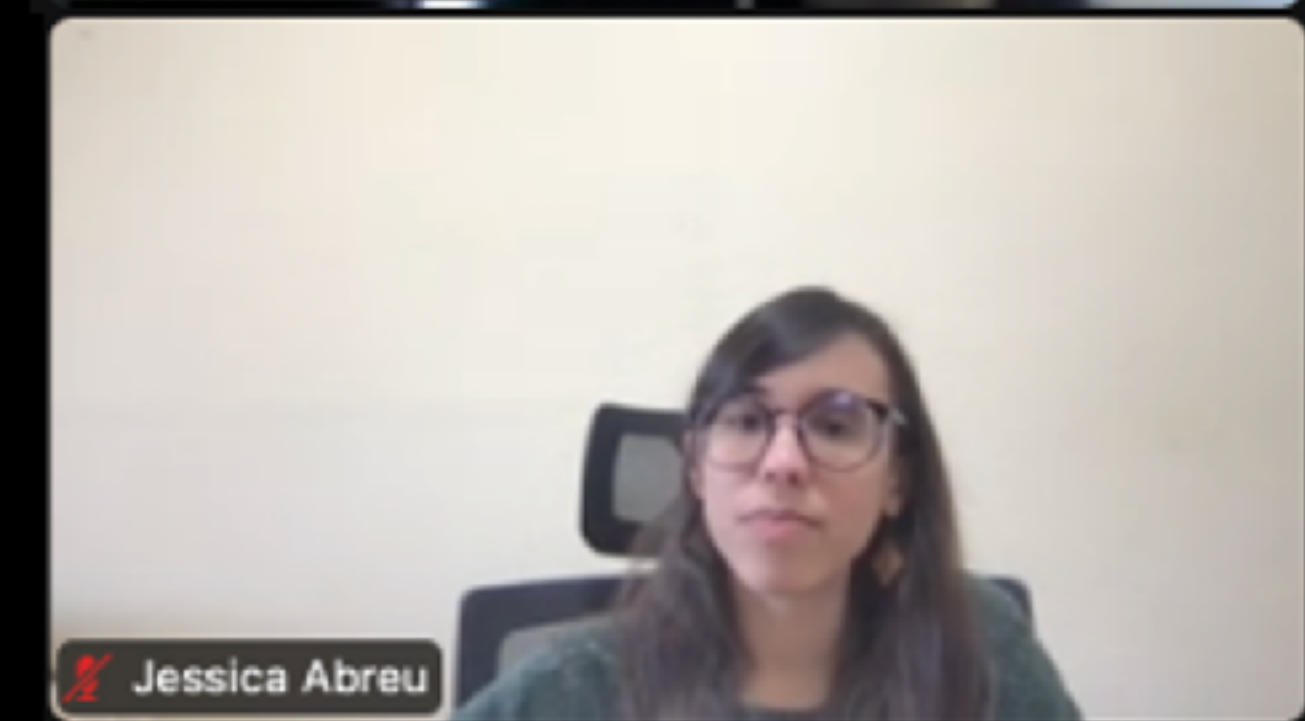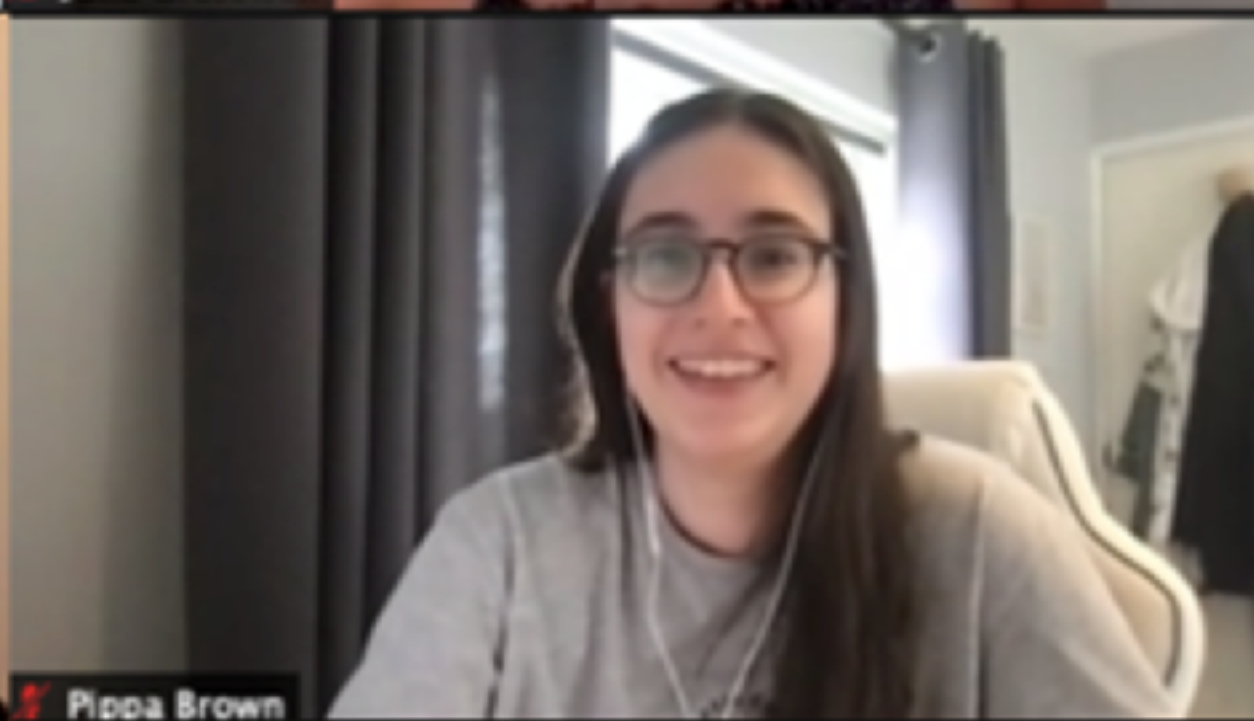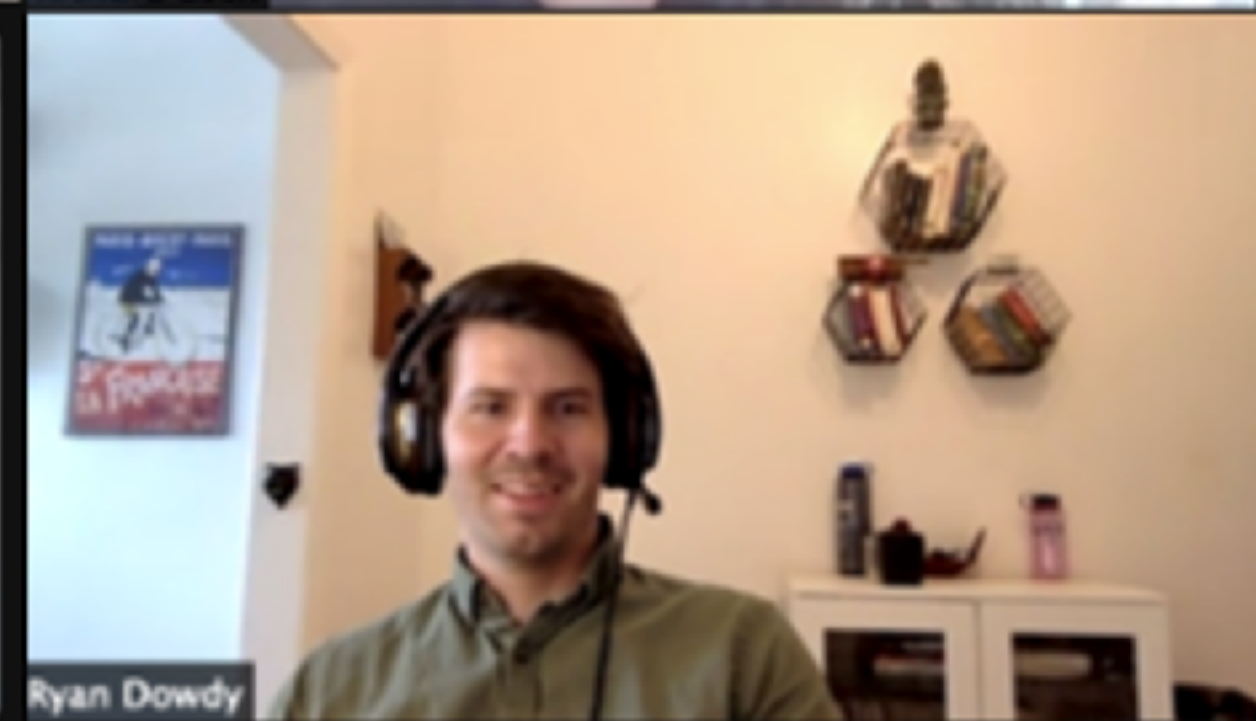Co-founder of AirManual and Spidergap

AirManual

AirManual

What's taking up your *time*?

What's causing you *stress*?

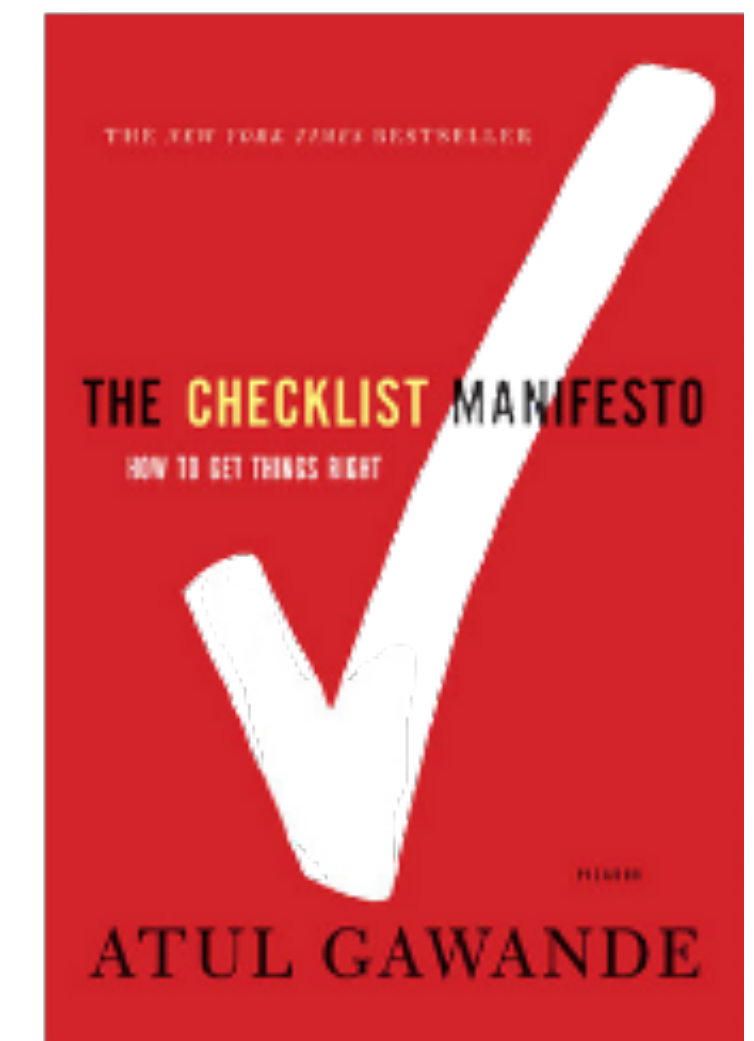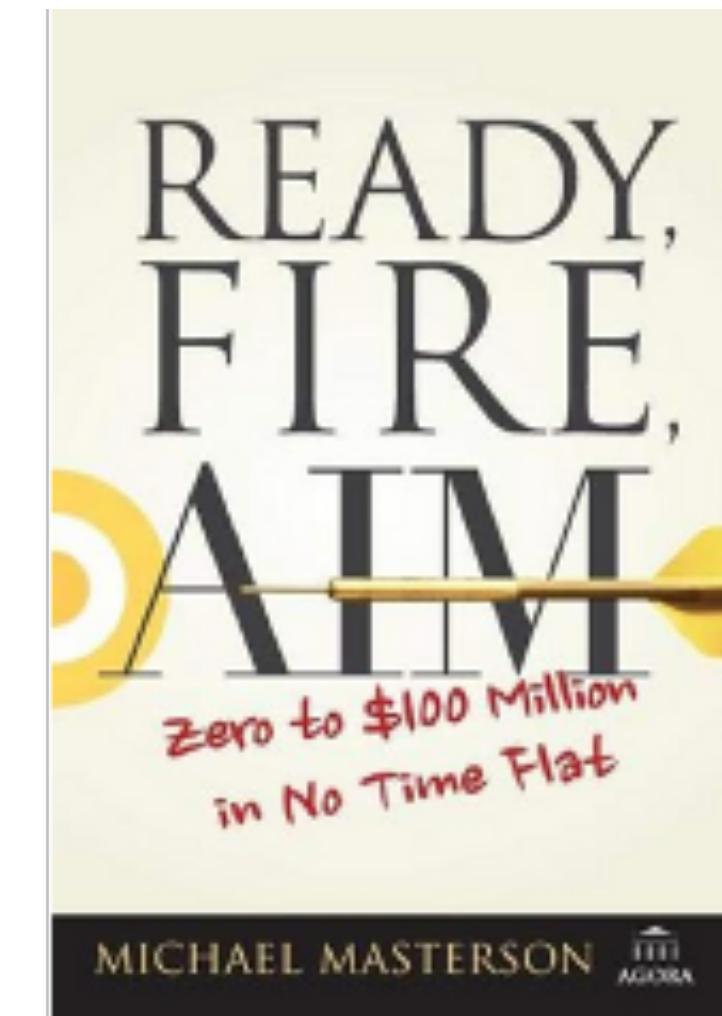What's holding back *performance*?

How to free up *time*?

How to reduce *stress*?

How to unlock *performance*?

AirManual

In theory, we already know the answer…

Document your processes, so they can be delegated and improved upon.

AirManual

Spidergap Training – Overview

There are 5 sections to the training, including 4 x calls and 1 x email support:

Calls:

1. **Demo / Set Up** (how the system works and explanation of reports etc)

2. **Set Up Trial** (if not completed on Demo / Set Up Call)

3. **Trial Review** (checking in to see how they got on with trialling the project out and if come across any blockers then how can we help them)

4. **Project Planning & Set Up** (they have run their trial, set up their project and we now need to guide them with any blockers/decisions that need to be made)

5. **Project Review** (review how they got on, any issues, good experiences, collect testimonials/feedback etc.)

Email Support:

1. Customer Support Email via Intercom

Spidergap Training – Demo / Set Up Calls

1. Company context, background etc.

Refer to script / trainer's explanation.

2. Calendy

Set up

3. Calendar

Google calendar set up

Block out unavailable time

4. Email/Calendar

Arrange access to Spidergap Calendar and block out time available

Arrange mobile & Slack notifications

5. Access to Customer Success Manager Resources (Dropbox) inc. Script and Collateral

Dropbox access

Install Java & FreeMind

SpiderGap Process Map

Communication: Inform Level 12+ leaders about 360 existence	Leaders inform their manager about 360 interest	Department Leaders submit request form for x number of employees/ who to take 360	Talent COE reviews x number of employees going through 360
System automatically sends reminders to participant/ recipients	Participant receives notification of 1) self assessment and 2) proposed recipients	Talent COE enters employees into SpiderGap	Department Leaders Pay SpiderGap for x number of 360s
Participant & Recipients complete assessments	System automatically forwards final report to Participants	Talent COE informs Participant about who is their Coach	

Questions

- What level of employees will be going through the 360s (i.e. level 9+?)
- How are we informing employees that the 360 exist in the first place?
- How are managers paying for the 360 (is there a link for them to go to purchase the 360)
- How are employees applying for the 360

Key	SpiderGap	Client

In this session, you are going to learn how to:

1 **Free up 15+ hours/week by making delegation quick and easy**
How to quickly solve some immediate pains, free up 15+ hours /week (and make sure that documentation efforts always give a ROI in 1-3 weeks)

2 **Onboard team members in days rather than months**
How to get new team members up-to-speed and performing well in days rather than months, whilst saving managers 60-200 hours per hire

3 **Make processes and onboarding easy to manage and scale**
How to empower your team to spot issues, improve processes, and stop guidance going stale… even if you are out of the business for 6+ weeks

AirManual

About Alexis

Started own consultancy

Co-founded AirManual

2007

2010

2014

2021

Process Consultant

Launched a 360° Feedback Tool

AirManual

Product   Services   Resources   Pricing   Sign in   **Schedule demo**

Move faster with clear processes and role onboarding

Share your processes, training and role onboarding in a format that actually works. With AirManual, you'll help your team to move faster, make fewer mistakes, and free up hundreds of hours of leadership time.

Get started   **Schedule demo**

Send an invoice

✓

✓

✓

4

Trusted by businesses from their first employee to their 100,000th

Symbia   germains   Thomas Cook   Sony Interactive Entertainment

AirManual

Service providers
- Write Business Results
- mbs accountants
- Shortlist Marketing
- Formed Architects
- Royvon
- The Expert Eye
- Absolute
- UK Football Trials
- The Great Voice Company
- We're Moving Relocation Services Ltd
- Design in the Shires
- ML Property Venture

Construction & Retail
- CEIBA Renewables
- UK Energy Watch
- Haydon Bridge Pharmacy
- Cornerstone
- Rainbow International Restoration
- Simply Solar
- Clough's of Nantwich

Online & Manufacturing
- Thomas Cook
- Harlequin Clothing · Print · Signage
- Rocuba Packaging
- Puzzlers Club
- Sevron
- germains seed technology
- Sony Interactive Entertainment
- Spidergap

Education & Memberships
- Kip McGrath Education Centres
- Symbia
- LUBAS
- elevate talent
- The Corporate Finance Network
- Music Academy Midlands
- Buttercups Training
- TheCityUK

Coaches & Consultants
- The Business Catalyst
- CRM Insights
- The All In Company
- Journey Alliance
- Just Great HR — Making the complex simple

In this session, you are going to learn how to:

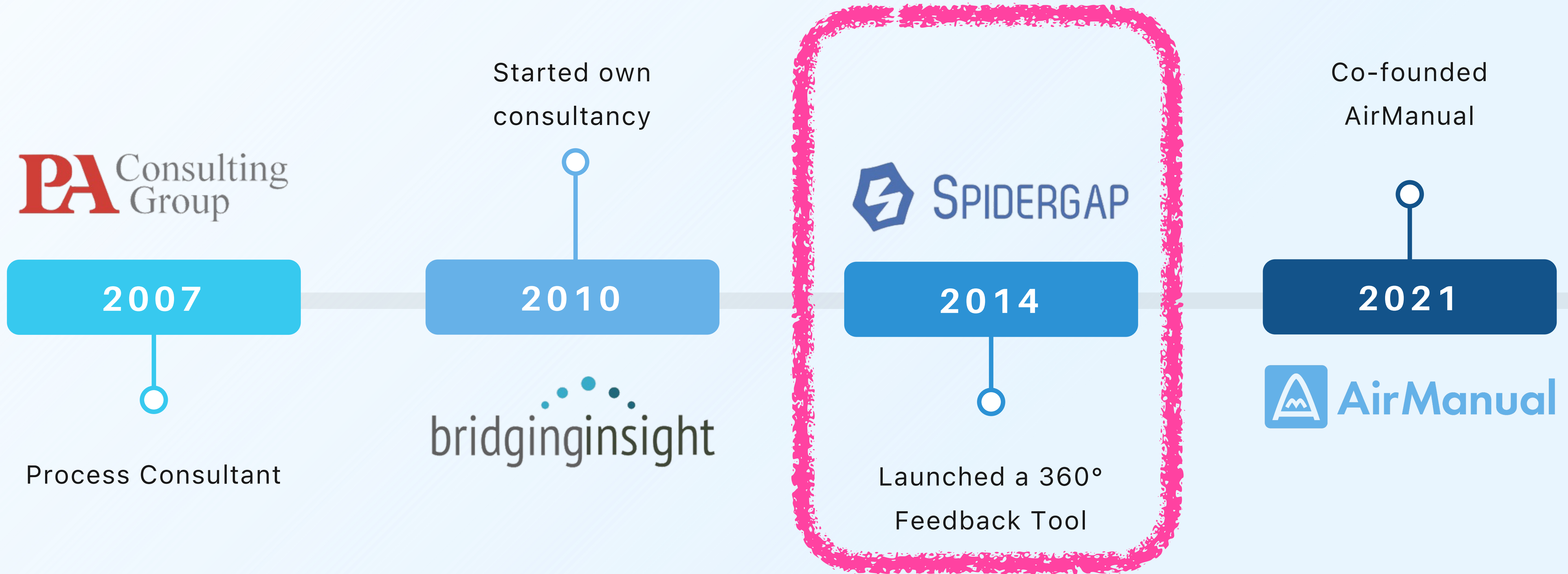**1** **Free up 15+ hours/week by making delegation quick and easy**
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AirManual

1

Free up 15+ hours/ week by making delegation quick and easy

AirManual

About Alexis

2007 — Process Consultant
PA Consulting Group

2010 — Started own consultancy
bridginginsight

2014 — Launched a 360° Feedback Tool
SPIDERGAP

2021 — Co-founded AirManual
AirManual

Send invoice to customer for done-with-you service (Xero)

As soon as a customer agrees to pay for done-with-you service, send over an invoice for payment.

✓ Thank the customer and tell them we'll send an invoice >

✓ Create new invoice in Xero >

③ Enter invoice information >

④ Check the invoice looks right >
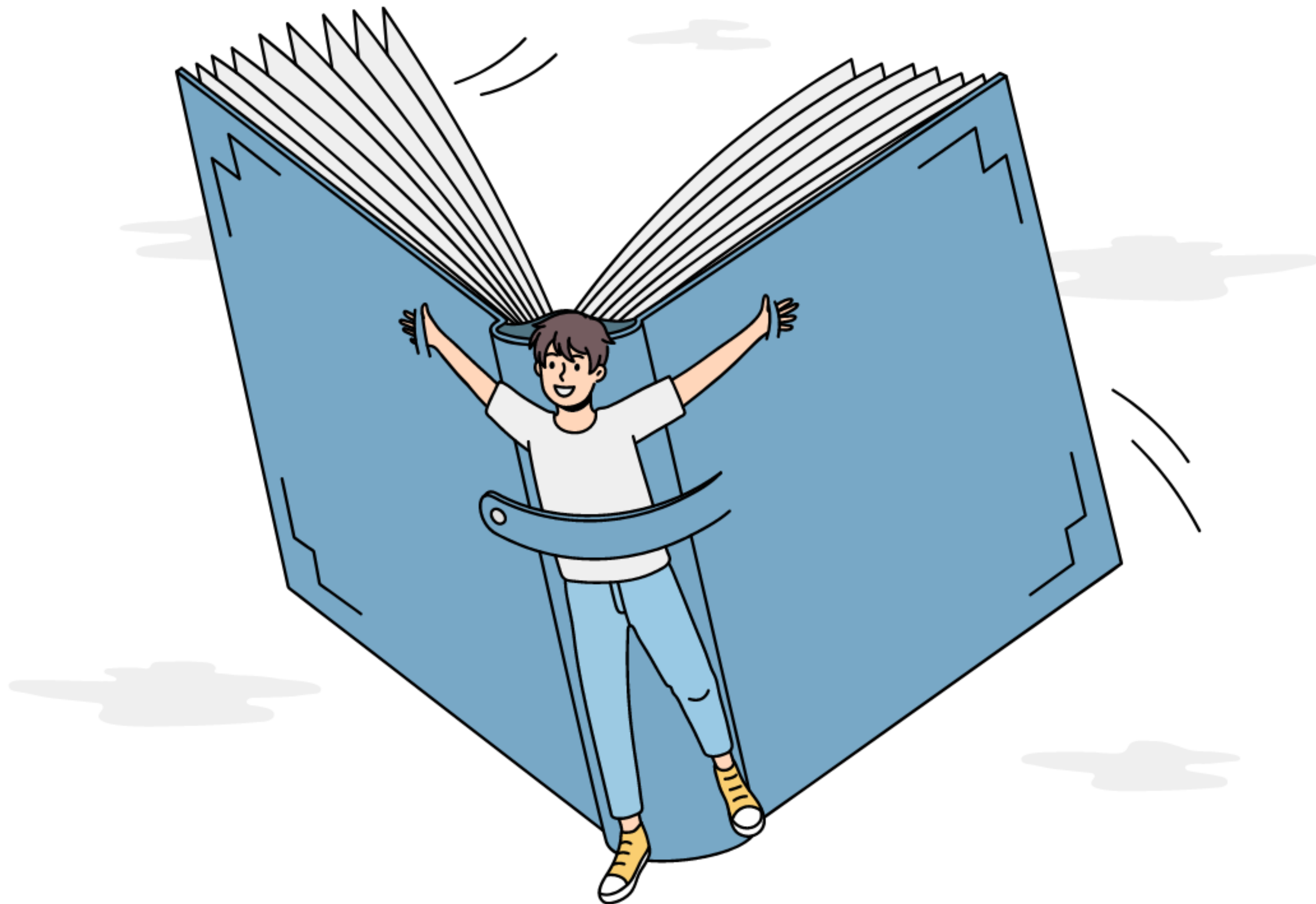
⑤ Send invoice to customer >

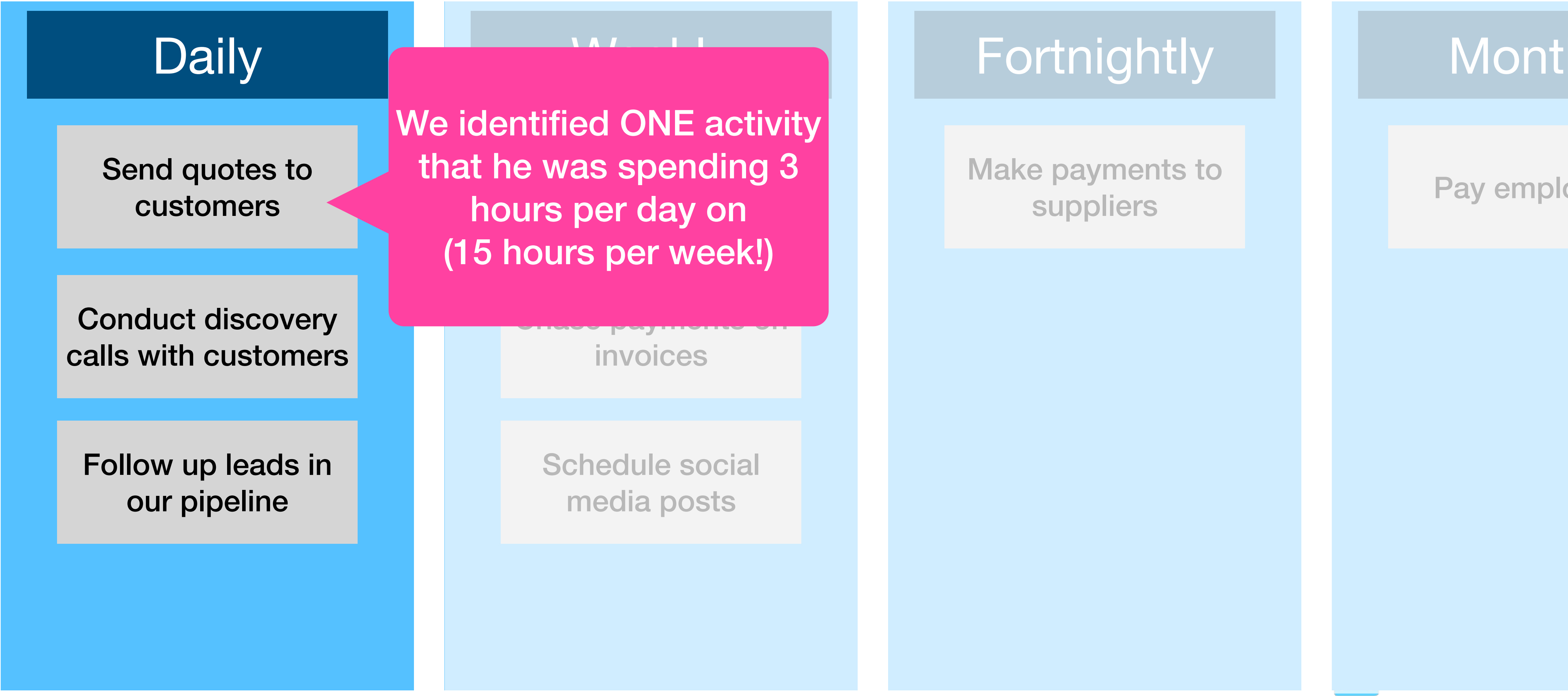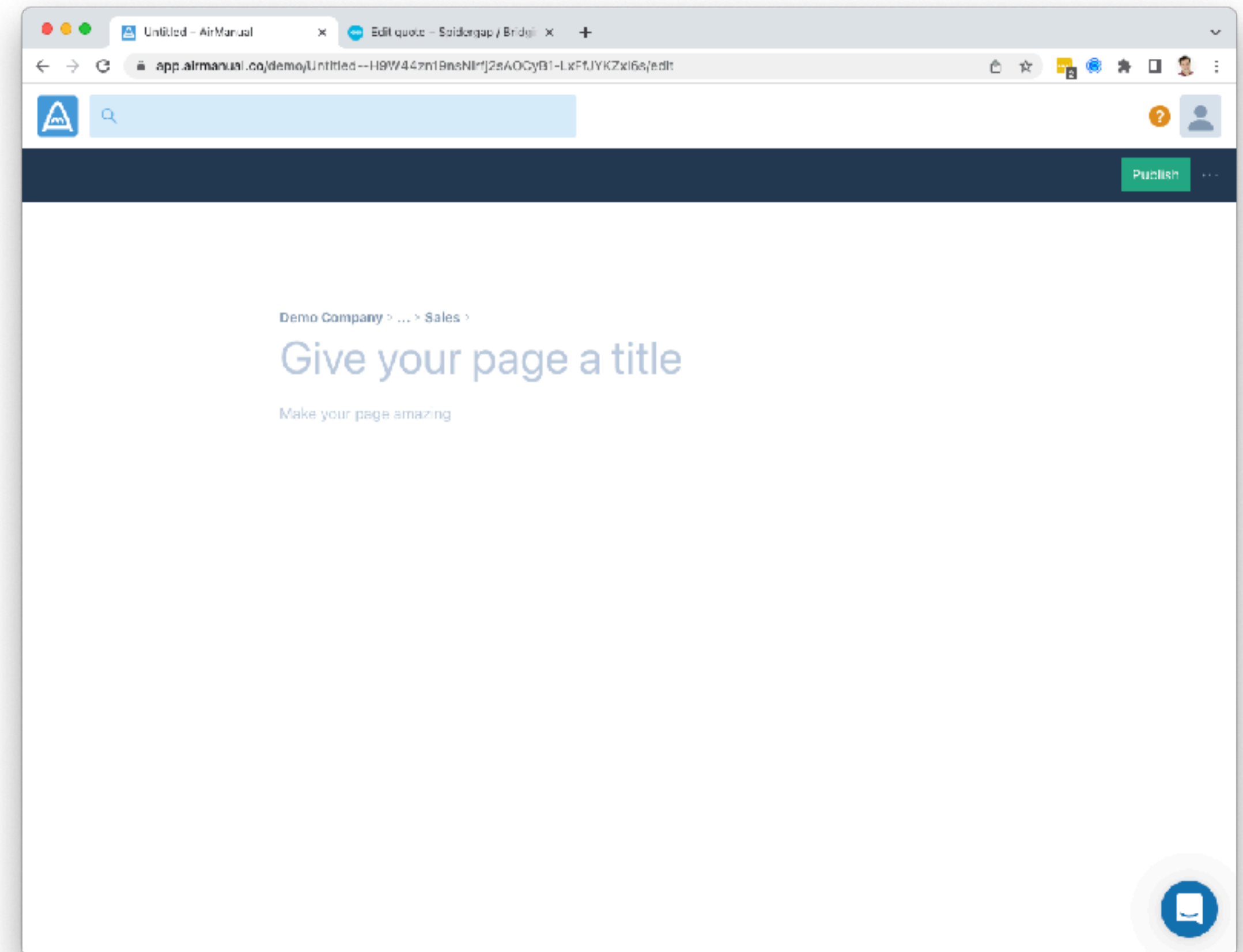⑥ Update Pipedrive >

Complete checklist

What activities do you spend most of your time on?

Daily

Send quotes to customers

Conduct discovery calls with customers

Follow up leads in our pipeline

Weekly

Chase payments on invoices

Schedule social media posts

Fortnightly

Make payments to suppliers

Mont

Pay emplo

We identified ONE activity that he was spending 3 hours per day on (15 hours per week!)

I'll show you how I did this live on the call, using AirManual

(Of course ;)

We added explanations and screenshots to explain tricky bits and logic

We added warnings to prevent common or high impact mistakes

app.airmanual.co/demo/Send-quotes-to-customers--4ZlFc4rOVmFxY2qXLqNobTNx-2ubhls9oR63W/edit

Publish

4 Add requirements into price calculator

5 Prepare quote in Xero

1. Open Xero > Quotes
2. Click 'New Quote'
3. Enter key information:
    a. Customer Name
    b. Description, Quantity, Amount (based on information in price calculator)

∨ Set the right Tax amount

If we don't set the correct tax amount it can take a lot of time later, and sometimes even lose us money. So, make sure that:
• UK customers are charged 20% VAT
• All others are charged 'Zero rated' VAT
• Amounts are quoted 'Exclusive of VAT'

See example below:

AirManual

Demo Company > ... > Sales >

Send quotes to customers

Each day we receive many requests for quotes via our website. Use this process to respond with a quote that the customer can accept, and update our CRM so that we can follow-up.

1. Open the Request for a Quote (RfQ) >
2. Check against CRM in case we've had previous contact >
3. Add / update CRM >
4. Add requirements into price calculator >
5. Prepare quote in Xero >
6. Send quote via email >

Use this checklist

On a follow-up call with his team, we handed over to his Account Managers who could then 'Use' the checklist…

AirManual

They found it easy to follow the steps

Open the Request for a Quote (RfQ) >

Check against CRM in case we've had previous contact >

Add / update CRM >

Add requirements into price calculator >

5 Prepare quote in Xero ⌄

1. Open Xero > Quotes
2. Click 'New Quote'
3. Enter key information:
   a. Customer Name
   b. Description, Quantity, Amount (based on information in price calculator)

Capture Quote no:

QU0062

...and to capture data to refer to later

> Set the right Tax amount

See example below:

Complete checklist

AirManual

Free up 15+ hours/week by making delegation quick and easy

How to quickly solve some immediate pains, free up 15+ hours /week (and make sure that documentation efforts always give a ROI in 1-3 weeks)

AirManual

2

Onboard team members in days rather than months

AirManual

Get started as a new Spidergap employee

Welcome to the team! We're super-happy to have you here 🎉

The steps below will help you find your bearings in the company. We'll connect you to the team, share our goals, and set up the key tools we all use.

You are going to learn a lot by following this checklist and this will take time. So, just take it step by step, don't rush or read ahead — just keep completing each step. If you get blocked, reach out to a colleague and continue on with the rest as best you can until you get unstuck.

Have fun! 😄

Complete checklist

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Have fun! 😄

Join the team

1. Join the welcome meeting >

2. Meet with your manager >

3. Meet your buddy >

Complete checklist

3

Make processes and onboarding easy to manage and scale

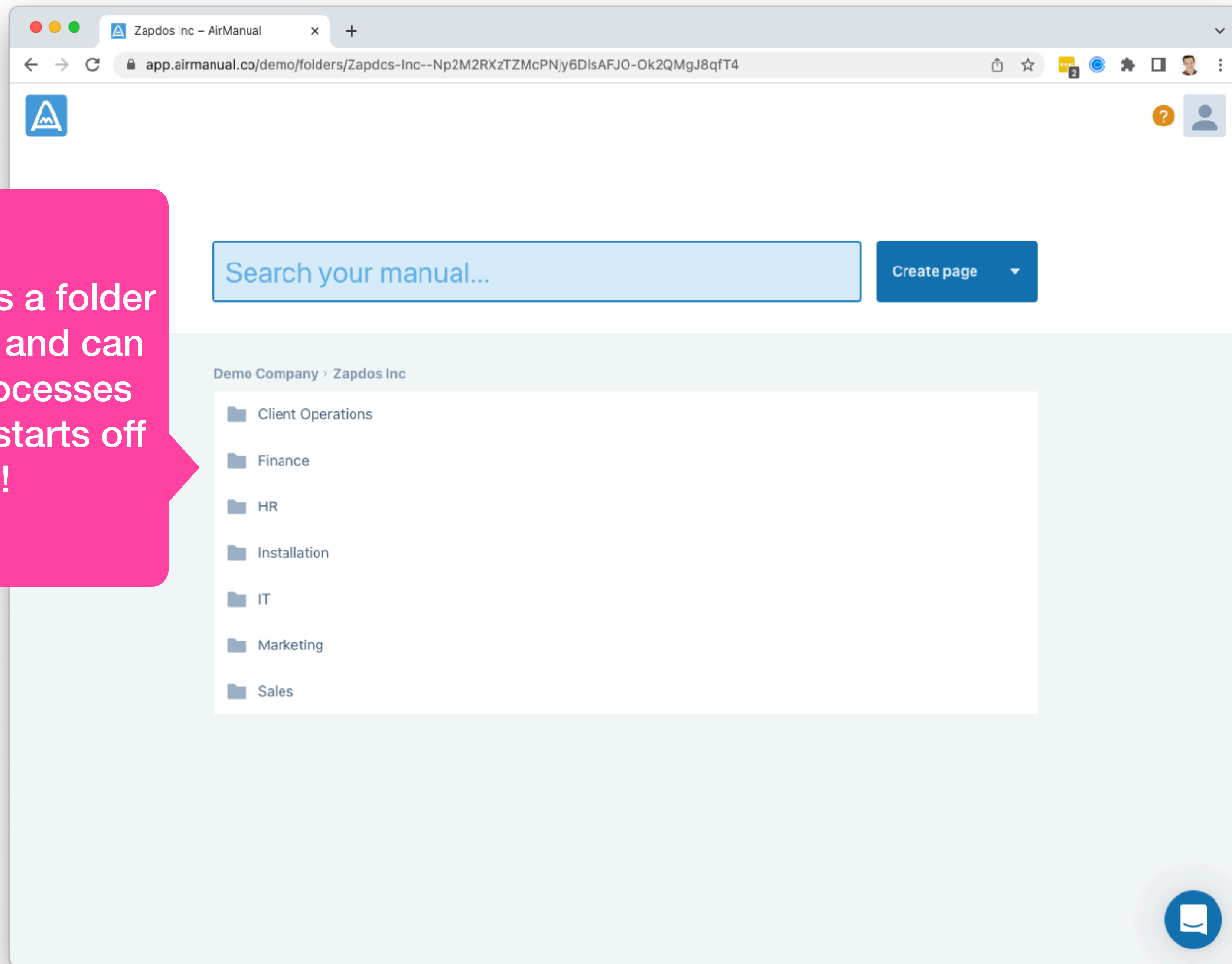"No institution can possibly survive if it needs geniuses or superhumans to manage it. It must be organized in such a way as to be able to get along under a leadership composed of average human beings."
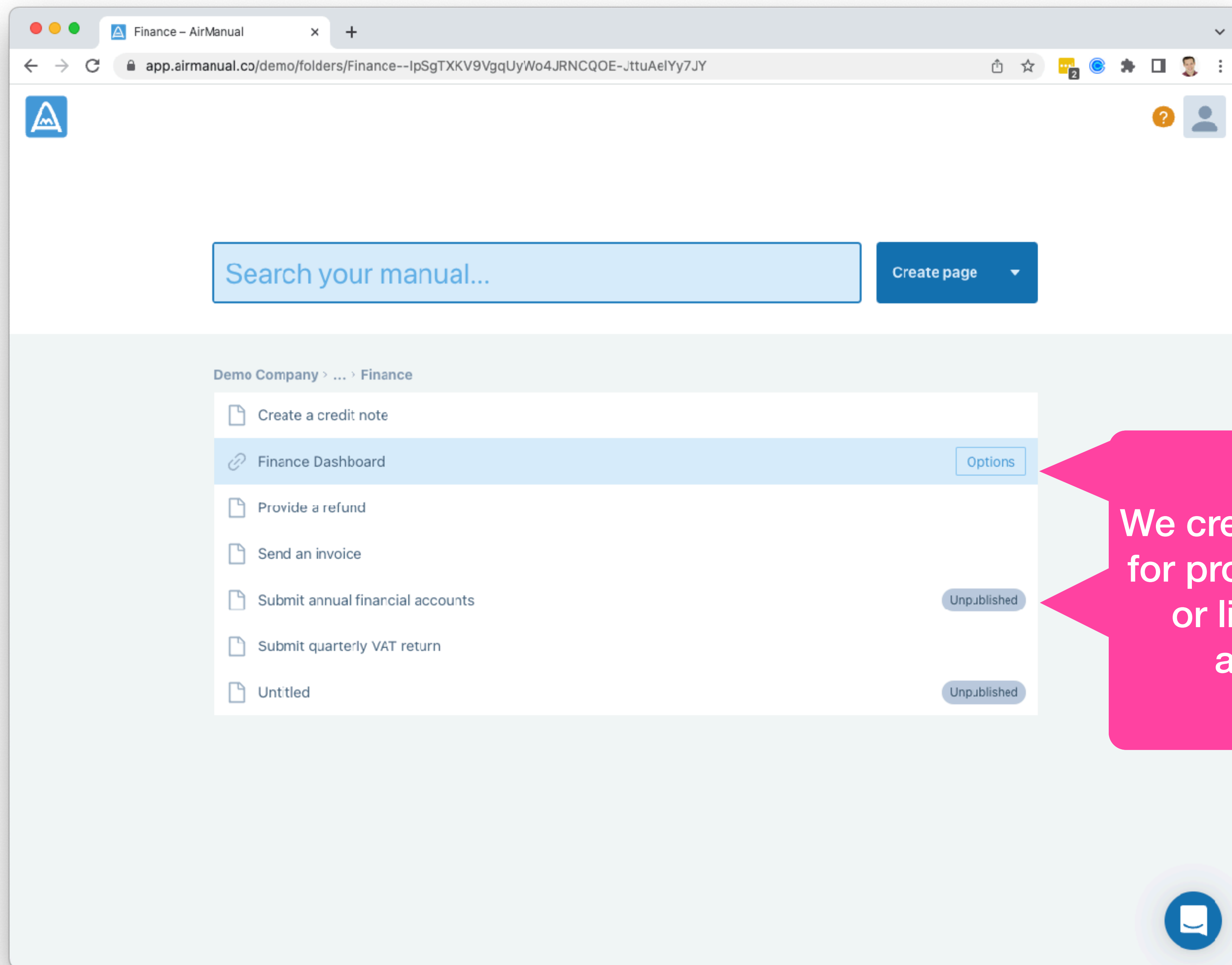
— **Peter Drucker**

Every team has a folder that they own and can keep their processes in... even if it starts off empty!

We create placeholders for processes we need or link to what we already have

docs.google.com/spreadsheets/d/1ANKhXRdajaEWot_q_iZMVpkt4wZwV6sxVdP0radKlv0/edit#gid=2048963300

Sample process dashboard

Last edit was made on July 11 by Patrick Mann

File   Edit   View   Insert   Format   Data   Tools   Extensions   Help

100% $ %   .0   .00   123   Calibri   10   B   I   S   A

A1

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1		Support			Management							Documentation					
2		Guidance	Experts		Action needed	Frequency (once every)	Owner	Last run	Next due	Status		Action needed	Priority	Documenter	Reviewers	Deadline	Status
3	**Developer**																
4	Set up local environment	SOP	All												PM		
5	Plan a product update	SOP	All									Update	Low	DG	PM		
6	Develop solution and tests	SOP	All												PM		
7	Peer review	SOP	All												PM		
8	Handle change in scope	SOP	PM, DG									Create	High	DG	PM		
9	Diagnose and fix a bug	SOP	DG, RL									Create	Very high	DG	PM	7 Jul 2022	OVERDUE
10	Clear code rules	Pclicy	PM, DG		Review	12 months	DG	6 Jan 2022	6 Jan 2023	OK					PM		
11	Our application architecture	Training	PM, DG		Review	12 months	PM	4 May 2022	4 May 2023	OK					DG		
12	Our database schema	Training	PM, DG		Review	12 months	PM	14 Nov 2021	14 Nov 2022	OK					DG		
13	How to use dataloaders	Training	PM		Review	12 months	PM	4 Jul 2021	4 Jul 2022	OVERDUE					DG		
14	How to update the document editor	Training	PM, DG		Review	12 months	DG	14 Nov 2021	14 Nov 2022	OK					PM, DG		
15	Get started as a developer	Onboarding	PM, DG												PM		
16																	
17	**Development lead**																
18	Facilitate daily standup	SOP	All												DG		
19	Facilitate sprint review	SOP	DG, PM												DG		
20	Recommend new OKRs	SOP	PM		Follow SOP	3 months	DG	8 Jul 2022	8 Oct 2022	OK					PM		
21	Prepare for a new developer	Onboarding	PM												PM		
22																	
23	**Tech support rep**																
24	Action a support ticket	SOP	All												DG		
25	Review vulnerability alerts	SOP	All		Follow SOP	1 week	RL	7 Jul 2022	14 Jul 2022	OVERDUE					DG		
26	Review server errors	SOP	All		Follow SOP	1 week	RL	30 Jun 2022	7 Jul 2022	OVERDUE		Create	High		DG		
27	Update engineering dashboard	SOP	PM, DG		Follow SOP	1 week	RL	4 Jul 2022	11 Jul 2022	OVERDUE		Create	Very high		DG	28 Jul 2022	OVERDUE
28	Get started in tech support	Onboarding	DG, PM												PM, DG		
29																	
30	**Tech support lead**																
31	Recommend new OKRs	SOP	PM		Follow SOP	3 months	RL			NOT RUN					PM, DG		
32	Prepare for a new tech support rep	Onboarding	PM, DG												PM, DG		
33																	
34																	
35																	
36																	
37																	
38																	

shboard   Sample 1: Guidance added   Sample 2: Content prioritized   Sample 3: Team members assigned   Samp

Explore

AirManual

📈 Marketing

	Train the team ⓘ		Manage recurring processes ⓘ		
Name	**Partially trained**	**Fully trained**	**Next due**	**Owner**	**In progress**
Areas					
📁 Brand					
📁 Content marketing					
Podcast					
🔢 Plan podcast episodes		PM KM	12 Sep 2022	PM	1 checklist
🔢 Deliver a podcast episode		PM	28 Sep 2022	PM	1 checklist
🔢 Repurpose a podcast episode	JA	PM KM	28 Sep 2022	KM	
Blog					
🔢 Plan blog posts	KM JA	PM	23 Sep 2022	PM	
🔢 Create a blog post		PM KM +2	30 Sep 2022	JA	2 checklists
🔢 Review a blog post		PM PM	7 Oct 2022	PM	
🔢 Repurpose a blog post	JJ	PM KM +3	14 Oct 2022	KM JA	
Case studies					
🔢 Plan case studies					

[Make processes and onboarding easy to manage and scale](#)

How to empower your team to spot issues, improve processes, and stop guidance going stale… even if you are out of the business for 6+ weeks

AirManual

How many of you are excited and ready to apply this to your business?

AirManual

Free guide and call with an expert

https://airmanual.link/CFO23A

We want to make your life better

At AirManual, we help business leaders to give their teams the guidance, processes, and onboarding they need to excel.

In doing so, we expect to:

✓ Free up 100s of hours of leadership time
✓ Prevent mistakes that cost £10,000s
✓ Reduce the time it takes to onboard new joiners by 80%
✓ Reduce both employee churn and hiring costs
✓ Increase business value by 20%

But that's not our real goal.

We're here because we've experienced what it's like when your employees are dependent on you. When you have no time. When the same mistakes keep happening.

We're here because we've worked the long hours. We've had our holidays disrupted. We've felt the anxiety. We're seen the impact it's had our own wellbeing, and that of our families.

We're here because solving this stuff is life changing.

And we want that for you.

Paddy and Alexis
Co-founders at AirManual
Hosts of De-stress Your Business podcast
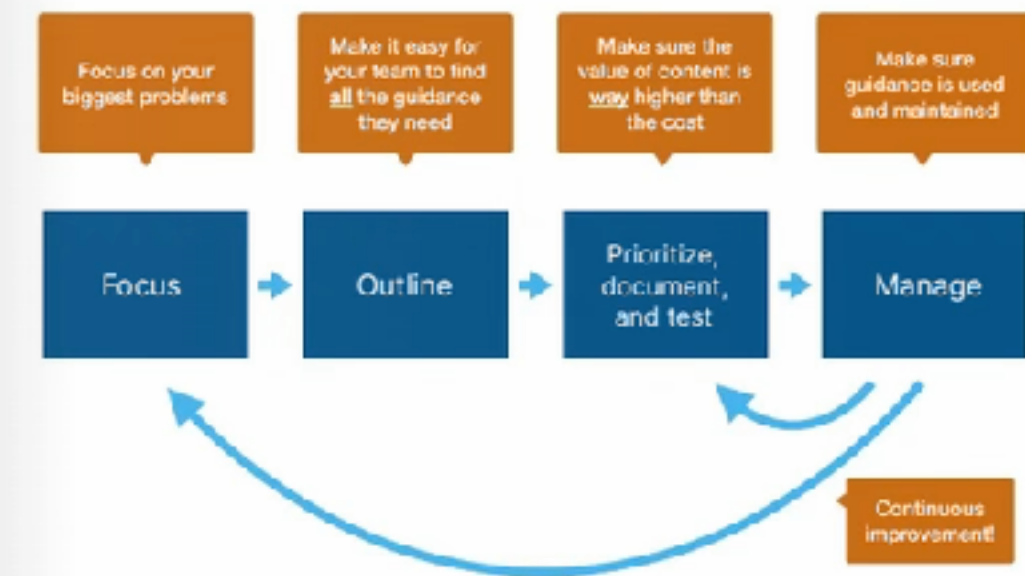
2

Our approach, tool, and consulting

Most initiatives to give employees better guidance fail.

This is because content:

• Isn't 100% focused on solving big problems
• Isn't easy for employees to find when they need it
• Takes too long to document
• Doesn't get consistently used or maintained

To solve this, we've developed an agile and iterative 4-stage approach that works with any size of business (from your first employee to your 100,000th).

Our online platform at www.airmanual.co makes each stage 10x easier compared to using other solutions (pages 8-13). We offer consulting options to help new customers get value quickly, and to help existing customers to scale (pages 14-15).

3

AirManual

WRITE BUSINESS RESULTS

"The tool is really easy to use and intuitive."

Music Academy Midlands

"The biggest value for us has been working with somebody and having deadlines where I've got to get something done, or as much as I can before we next meet again — I don't think I'd have done this had I not gone through it with you guys."

THE ALL IN COMPANY
★★★★★

"Very intuitive and I like the simple design and I like the flexibility of it."

"I'm so pleased you encouraged me to do this with you. I was initially resistant at the start, thinking it wouldn't be helpful, but I couldn't see my own blindspots."

mbs accountants

"It would be silly not to move everything into AirManual because it's so easy to use..."

THE somatic SCHOOL

"I always feel busy IN the business, and struggle to find time to work ON it. Having these calls has been really useful — we've created processes that I can now push out."
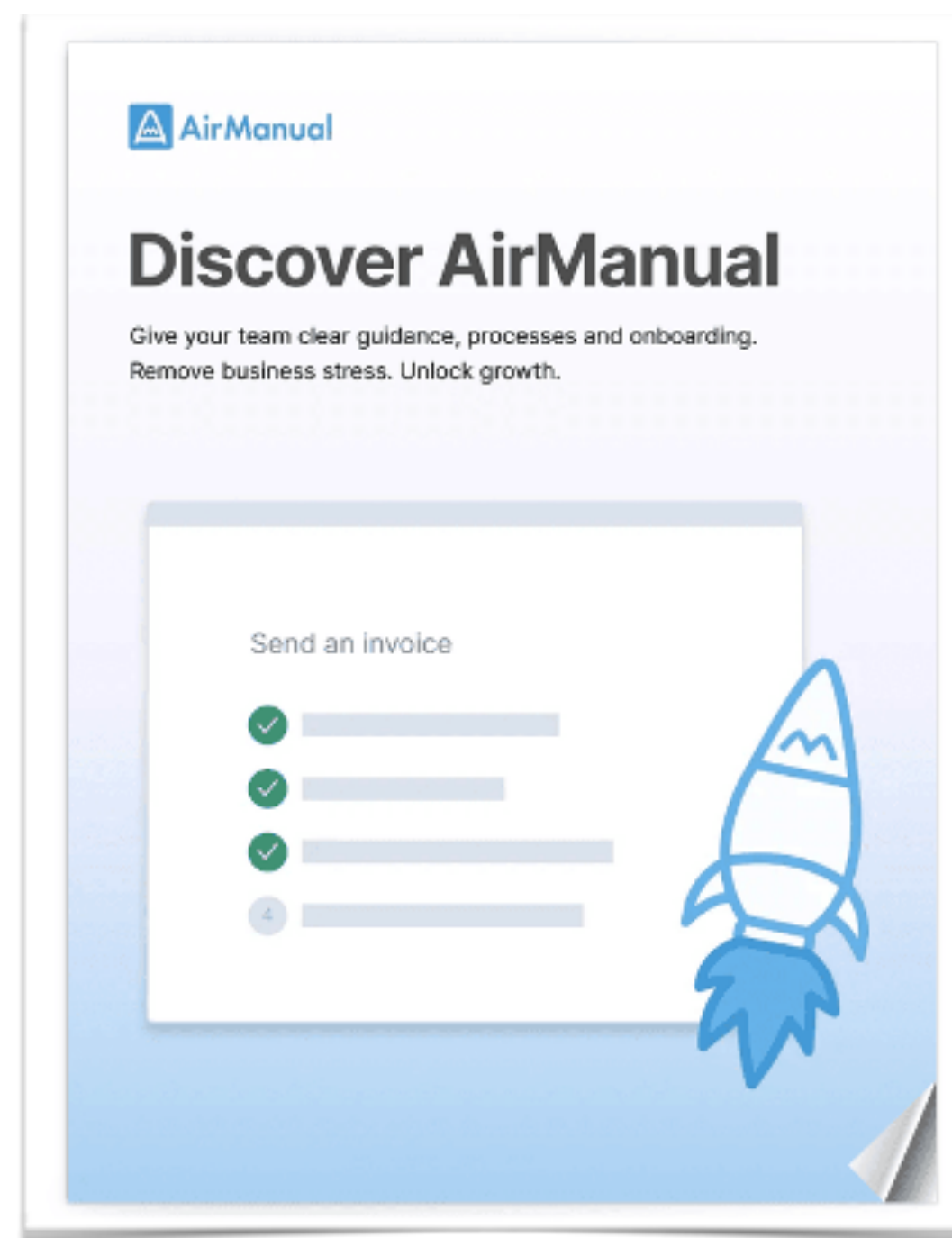
UK FOOTBALL TRIALS

"I can't believe all we've done in such a small amount of time"

UK ENERGY WATCH™
Helping you become energy efficient

"This is so helpful... I mean it's all such a mess in my head and you've taken it out of my head and it's brilliant... I feel like we're getting somewhere."

DESIGN IN THE SHIRES

"I tend to be a bit overcomplicated in the way I explain things sometimes, whereas AirManual breaks it down and makes it much more of a team participation thing rather than just me barking how I want things to be done."

AirManual

Discover AirManual

Give your team clear guidance, processes and onboarding. Remove business stress. Unlock growth.

Send an invoice

Alexis Kingsbury

alexiskingsbury.com

destressyourbusiness.com

airmanual.co

AirManual