Getting started with

Boldly

EFFICIENCY + RELIABILITY + QUALITY = OUR SERVICES

Boldly is a premium subscription staffing company, which provides personalized matching to long-term remote staff on a simple monthly subscription. We get to know your business as well as your particular needs and requirements. We then provide the best staff member to create a dynamic and professional synergy that helps your business to excel and grow. Our team of employees is based in the US.

We call it a "win-win", where our employees get to offer their best and grow in a position that is fulfilling, while our clients are thrilled with the difference our team make in their business!

This guide is written to help you make the most of your new partnership.

The difference between ordinary and extraordinary is just that little "extra"

WHAT YOU CAN EXPECT

Your Boldly staff member is selected for their skills and proficiency in their area of specialty, whether that's executive assistance, marketing, project management or another skillset. **You can expect:**

✓ A dedicated staff member with a whole support team at your fingertips

✓ A staff member with 10+ years of experience in a corporate or similar professional environment

✓ A can-do attitude, and a proactive outlook

✓ Reliability, trustworthiness, and discretion

✓ An innate sense of service

✓ Professionalism in all communications

✓ Steadiness and dependability

✓ Adaptability to your circumstances, and requirements

✓ The flexibility to work on different projects within your organization

GETTING STARTED

At Boldly, we offer a complimentary Launch Meeting where we follow an established process to ensure that your staff member is clear on your expectations, and their deliverables. Just like you would with an in-house office employee, start by giving your new team member an overview of your company, and the role they will play to support you. This includes:

✓ Practical information such as system information and procedure guidelines.

✓ A clear expectation of the role with itemized deliverables and timelines.

✓ A good understanding of your company culture. Is the tone of your emails friendly and hip, or professional and serious? How would you like your staff member to sign their emails, and what is your preferred greeting for answering the phone?

✓ An overview of the practical communication tools you prefer to use such as daily emails, Skype, and GoToMeeting.

✓ The systems you will be using to share information and files in addition to emails. You might consider using Dropbox and Basecamp, for example.

MAKE THE MOST OF YOUR PARTNERSHIP

✓ **Treat your staff member as the valuable member of your team they are.** Include and enlist them as much as you can!

✓ **Build trust.** Take the time to get to know your staff member as if they were working in the same office as you. Skype or Zoom is a great way to do this via periodic video calls.

✓ **Keep in touch.** We recommend that you over communicate in the beginning to set the stage and to be available to answer any questions. You may also want to ask your staff member on a regular basis, "Am I clear?" or "Can you explain this task in your own words?" until you feel confident that there is a mutual understanding of the tasks, and your business.

✓ **Don't assume anything.** Remember that there are going to be things that are obvious to you, because you are immersed in your business, which may not be obvious to someone else at first. The clearer the better!

THANKS FOR ASKING!

We've collected the most popular questions about Boldly. Feel free to contact us directly at hello@boldly.com if you have any additional questions that aren't covered here.

✓ **What makes your service different than the competition?** Our US team members are employees of Boldly, not contractors, and all have 10 to 15+ years of corporate experience and a proven track record in their industry. This means that when you invest time bringing one of our team onboard you can rely on them to be around for the long-term. We choose team members who have an innate sense of service, and who will go above and beyond the call of duty to foster long-term partnerships.

✓ **What if I don't need all the skills listed on your website?** We understand that each business is unique, and for this reason we have assembled a versatile team with different skill sets and professional background. Let us know your requirements, and we'll suggest a team member to match your needs.

✓ **How do I get matched with a staff member?** We take as much time as you need to get to know your business and your unique requirements and then we suggest someone we believe has the very best skills for the job and the personality to click with you and your company culture (98% of our new clients end up working with their first suggested match). You will get a chance to review profiles, and to meet with your potential staff member **before** deciding to sign up with us, which is rare in our industry.

✓ **Is it safe to give financial information like bank accounts and passwords to my staff member?** While all of our team members go through a rigorous interview process and sign a NonDisclosure Agreement (NDA), we recommend that you first establish a strong working relationship with your new team member before you share this type of information. Treat your staff member as you would a new employee and build up the trust as you get to know them better. If you do decide to divulge confidential information, you might consider using an application such as Passpack or Dashlane so that you information is securely transferred.

✓ **What if something goes wrong?** Your account manager is always on hand if you have any questions or concerns and in fact, we are proactive to check-in on a very regular basis. We offer a 100% lifetime satisfaction guarantee, which means that if for whatever reason you are not satisfied with our services, you will receive your money back.

✓ **How do I communicate with my staff member?** You are welcome to communicate with your staff member in whichever way is most convenient to you! You might email, call, text, use Zoom or Basecamp - our team is highly adaptable!

✓ **Why don't hours roll over?**

The monthly plans that our clients sign up for are the best way for us to ascertain our team's availability for client work. To ensure a high level of accuracy with our team's availability, and to provide our clients with the very best support, unused hours do not roll over to the following month. Check out this article which explains further.

✓ **How can I protect my company information?**

All Boldly employees have signed a confidentiality agreement agreeing not to share information or intellectual property. In addition, we recommend that you take advantage of cloud technologies and save information and files on cloud-based platforms like Dropbox or Google Drive. This means that nothing will get lost, and your sensitive information is not stored on a personal computer. Our entire team is also covered by professional indemnity insurance. Working with Boldly provides an extra layer of security vs. working with a contractor or freelancer.

✓ **How long does it take for my staff member to do tasks?**

We provide a highly personalized service, which means that we'll find out your exact requirements and then suggest a staff member to meet your needs. If one of your requirements is to have someone available each day to answer customer queries between 2-4pm, then we'll recommend someone with that availability.

✓ **How does my staff member track their time?**

Our team tracks their time with our online proprietary Dashboard. This ensures accurate, up-to-the-minute time tracking. We track hours in "real time," which means that as tasks are being completed, the timer is running, and when the task is finished the time is "logged." You can view the hours that your staff member has logged at anytime via your own private Dashboard.

OTHER QUESTIONS?

Feel free to check the FAQ section of our website for additional information, and don't hesitate to get in touch if you would like to speak with someone live about how we might be able to support your business!