



Transcript for Podcast Episode: 018

Setting Up a Remote Team with Allison Sandberg

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Guest: Allison Sandberg

Michelle: On this episode of Profit Points, we talk to Allison Sandberg about how she developed her team remotely for her travel agency business. She talks about her struggles, some of the things that happened to her that she wishes she could have corrected up front and some of the benefits that she sees in having a business virtual. So join us on Profit Points. We are Modern CPA. Our purpose is to provide valuable information to small business owners on our podcast profit points. We discuss business how to's, give tax tips, and dig into real life experiences in the crazy world of running your own business. If you find this podcast helpful, then like subscribe and follow us on social media.

Michelle: Hey, everyone, thanks for joining us on this edition of Profit Points, where we talk to business professionals, industry leaders and other small business owners about what they are seeing in the crazy world of running your own business. And today we have Allison Sandberg and she is with Magical Memory Planners. Allison, please tell us about yourself.

Allison: Hi. So, like she said, my name is Allison and I'm the owner of Magical Memory Planners. We're a travel agency that specializes in family vacations. And so this is a virtual business in the sense that all of our sales people, all of our travel agents are virtual. We do not have a storefront. And we do all of our business virtually with our customers for the most part as well. So not only is our sales force virtual, but we also work with customers online and on the phone and on Zoom and that kind of thing. So sometimes we meet up with people if they happen to be in our area, but most of it's done virtually as well. So the agency started about 12 years ago. I started into the travel industry. I was the go-to travel person. People were coming to me for travel advice. And although my background was in teaching, I thought, I think this is an area that I love, that I'm passionate about, that I can help people with and it be a job. So turn your passion into profit. So we started the travel agency and it was just me booking travel and my focus was mostly at that time of actually booking the travel for our customers. And we basically focused on Disney destinations because that's where my specialty was at the time. And so over time, though, that has really changed. So as I got more customers, my base grew and I really have shifted in the last 12 years from being a travel agent to really a business owner. So although I still book travel myself, most of my focus is on running the agency and the business end of things, which I love very much.

Michelle: Oh, you do? So, yeah, that's one of the things I wanted to see. Like, how did you handle that shift? Because that's a big mindset shift going from the do do do as a

travel agent to a business owner and really just managing your team.

Allison: Yeah. So it's kind of a transition where it was like 90% selling travel and then like handling some of the business things on the side as we started to grow, really starting to shift that focus. And incrementally as time has gone by. So originally when it was just me, I started bringing on agents about 5 to 7 a year. And that gave us time to kind of acclimate people, get to know people. I found that they were maybe past customers or somebody that I had met online or a referral from another customer or client or something. But 5 to 7 kind of gave me a time to kind of bring people on. And initially our systems were what now seem archaic because when you're starting a business and you're super small, like a spreadsheet or something could work, but then that's not really like a long term...

Michelle: Yeah. So that brings us to the fact that we actually help people in accounting start with their accounting in a spreadsheet format and it's like, okay, this isn't going to be forever, but this is a good base. And so you were doing the same things, right? You were starting in some sort of spreadsheet and then kind of, I would imagine outgrew that pretty quickly. Yeah.

Allison: So we started with QuickBooks that we still use for all the financial end of things. Some of our inner systems that kind of kept everybody, we had a Facebook group so that everybody could kind of chit chat, which is fine with five or seven people. Now we have 35 people on the team. So that's not you know, and we're not just selling Disney destinations anymore either. So now we're selling more. Yeah, Europe and Alaska and all the places and stuff. And so we outgrew that. So we moved from a social gathering Facebook situation into a Workplace, which is also by Facebook and if you're aware of them but Meta. And so that's like our own Facebook. So we have groups and we have people you follow. And all like Facebook, but the entire thing is our organization. So we're able to organize groups around topics, around teams, around information, around needs. And I like to have a few groups that are work free zones so that we can be social because we're not in the office because we don't see each other. We want to celebrate birthdays and we want to share recipes and we want to.

Michelle: How do you feel that people respond to that? Do they like the non-work groups that you've created in this virtual setting?

Allison: Yeah, it gives us a chance to connect outside of work and hang out. So when somebody sees something funny or has a joke that they saw or a funny story, it's just a great place to connect outside and be able to connect outside of. Work is super important in a virtual business so that you have those relationships that you need to work together on the work stuff. So you kind of have to be intentional about that. Sorry about that. Yeah.

Shawn: No, that's okay. Did you have to write any kind of specific H.R. manuals related to these things? Because I'm sure, you know, this is a workplace environment. So how did you have to, like shift that or define that within this online group?

Allison: Yeah. So again, that has shifted over time. So when we started, we used things like Trello which would organize topics and ideas and now we're moving to an actually we're in the process of it right now working to build an agency website. So having a place where all of our procedures and planning is where we can do online training and keep track of that and have that all in-house on a website that's password protected. So it's just for our team. So now we're going to have basically two websites, our consumer website for our customers.

Michelle: Customer forward facing and then....

Allison: And then a full website for our own use where we can have those policies and procedures, those onboarding procedures. We're going to have training there that we're building in. So now when you're onboarding a new agent, they can go onto the agency website and start working through their training, you know, topics and modules. And that way we can get them onboarded to all the virtual systems that they have to have to kind of get into. So.

Michelle: So when you started with a few handful of people and you found that you needed different procedures as you grew and have constantly had to, I guess, tweak all of those procedures and probably learn from them as well. I don't know. I would imagine as a deserver, we all have our struggles and we tend to do things. And if it doesn't work, you have to try something else. But tell us about what kind of epiphanies or any kind of like aha, like this. I cannot do this anymore. This has to change or. Yeah, something like that with your business and your people. Yeah.

Allison: So we have an annual contract with each of our contractors. All of our sales personnel are independent contractors. So they do a contract renewal every year. And so the contract has certainly evolved and you know, a few things in regards to that because when you are doing virtual, you need to be able to manage all these people. And that contract is a big part of that. That's kind of like our Bible of what we're going to do, what we're going to allow, what we're not going to allow, and how that falls within the guidance of independent contractors.

Michelle: That must have been a building block. I mean, you had to probably start with something that you thought was going to be good, and then you're like, Oh, no, I got to add this, and then I got to add that. And then now it's probably multi pages and...

Allison: Yes, yes. And so yeah, the contract is always a work in progress. There are clauses in the contract that have names, which I won't say publicly, but they are in regards to situations that have occurred in the past. And so you have to learn from those things. One of the things we did was in order to manage people, we kind of started to create teams and team leaders, and that way they would have kind of a hierarchy. And in a sales business with teams and team leaders, one of the pitfalls is one of those teams might want to spin off and become their own company. And so we had to raid clauses to the contract as a learning experience from that procedure. And it didn't necessarily work out as well as I had intended.

Michelle: So did you do away with the teams and the team leaders after that, or did you stick

with it but just add some sort of, I don't know, non-compete and well, I guess you can't you can't have a non-compete if they're independent. Right. So you're kind of stuck.

Allison: Yeah, it's a tricky thing. So, yeah, we kind of did away with the teams and started to restructure again. And I did bring on two employees that, you know, obviously is a different structure than an independent contractor. So they can help with a lot of that management, but they're under a different contract. Well not even under contract. They're employees, so it's a different process. So that that was a way to develop the agents, develop training and develop that team atmosphere in a more protected way. So we've, we've had to kind of change that.

Shawn: Yeah. You mean in protecting your assets, which, you know, your clear clients, your processes, your procedures, all of that stuff is is really important and it's, it's, you know, kind of scary when it's out there with all these people, you know, all over the place that can just kind of take it off with it.

Michelle: You know. Right, right. So when you have these kinds of virtual settings where you're interacting with each other and you're providing. All of this training for everybody. Do you guys get together periodically throughout the year? Like, what does that look like? Is that optional for your people? What does that look like for you?

Allison: Yeah. So I think I mean, we're in the travel industry, so we love to travel. That's pretty simple.

Michelle: So any excuse...

Allison: But, you know, in the virtual world in general, I would highly recommend, you know, once or twice a year having some type of trip. And so we do rotate between agent only trips and family trips because we've found that there's value in both having the agents get together, focus more on business, focus on marketing or training and destination knowledge, and then sometimes having a trip where our families are involved. Because when you meet spouses and children and, and that you see people in their element, it starts to really form those relationships and people work together better. We meet our goals better when we're encouraging each other to hit those goals because we know each other and we care about, you know, what each other cares about and that kind of thing. So we do try to get together once or twice a year and rotating between agents only and families. And the family trips tend to be more of a social trip. We we did a cruise and we had about 35 people between the families and things and we had one official lunch so that it counted. But it was very important we did our awards and things like that. But it was nice to just be with the families and the kids got together and so that's important. We also do birthday cards, which seems like a simple thing, but we do birthday cards for everybody in the agency as well as all the kids. So that way all the kids are getting birthday cards from other agents, other agents, kids. And it's a fun thing when when you get flooded with these things on your kid's birthday. So another way to kind of create that company family atmosphere when you're not physically together.

Michelle: So yeah, that's really cool. The marketing side of things. I know you're really active as the business owner with the marketing and you have your own podcast, by the way, which you guys all need to subscribe to. Can you tell us what that is so that we can make sure we link it up with our podcast?

Allison: Yeah, sure. So our podcast is called Travel Talk with Magical Memory Planners, and we talk about different things with travel, whether it's a destination review. Sometimes we talk about traveling with families or different things. You need to know about airlines or anything related to travel. We talk about making them kind of short bite sized things, so they're just kind of a fun thing for you to listen to. Like usually less than 20 minutes and they are published once a month, usually the first Friday of the month. So you can listen to it everywhere you listen to podcasts.

Michelle: Are. Yeah, yeah. So you can go listen to that because that's a lot of fun stuff. I mean, yes, accounting is necessary, but not quite as much fun as travel. I would think.

Shawn: Right?

Allison: Yeah. Preview our episodes. Coming up, we're going to be talking with someone who did a really special trip for their 11 year old's birthday because when you're 11, you get your Hogwarts letter and you get to go to Hogwarts. I mean, that's what happened for Harry. So she did a whole thing about when her son turned 11, getting his letter and then traveling to Universal to celebrate the 11th birthday. So we got that coming out.

Michelle: Oh so fun. Yeah.

Shawn: Do you book or help companies book company trips and outings? They're not just the outings, but, you know, those kind of getaways for companies.

Allison: Yeah, we do some group travel. We have some agents that will do group travel. And so yeah, you could do a company trip. We don't necessarily do large corporation type trips, but you know, for shareholders or stockholders or where you have like an executive team that wants to travel together 8 to 10, maybe 30 couples, something like that. We have done that type of travel for those, although our specialty is family travel. But yeah. A little bit of that. Yeah.

Shawn: I mean a lot of, you know, we have a lot of small business owners who or may want to do something with their team or have a similar type of team like you where they're virtual and want to get together in a central location or whatever to take for a meeting or for some real event.

Allison: Yeah, we've also worked with companies that do award travel, so sometimes they want to give a trip to a top seller or for a fifth anniversary or 10th anniversary or something like that, where they want to give a trip to a family. And we work with a company where we kind of work up the financial ends and then we do the planning and with the couple or the family that's getting the trip. So sometimes we do things like that too.

Michelle: That is really neat. Yeah. So you have these agents that are working for you and you're doing a bunch of marketing on the top level. Do they also do their own marketing? I assume they do their own word of mouth marketing, but how much control do you have over any of that? Like your branding as it pertains to that. How does that work?

Allison: Yeah. So not a ton of control necessarily, but we try to be a really great resource. So we find that if we provide a lot of resources for people, they're going to tend to take the easiest route. So if we're providing resources, so we provide branding resources, if we provide plans, if we provide marketing strategies, it's really easy for them to plug in and start to like to adopt that. So like we're going to do a Christmas in July and we're going to focus on the agency brand as a whole. And then we'll in our marketing talk that will connect you with an agent that can help you kind of a thing. You know, we're focusing on Christmas in July, and we have all these resources. Well, it's really easy for an agent to be like, oh, let me plug into that baby. That's plug and play. Ready to go. There's videos, there's images. And so then they can use that image and then tag it to their own Facebook or use it with their own marketing or put their own email on it or something like that. So can we control it? No, but we can influence it and we can support it. And that really helps keep it going in the direction that we want it to go in.

Michelle: Yeah, because I would think that that would be important to kind of keep the same imaging and the same branding. Yeah, exactly and messaging. Yeah. All these people doing 20,000 different things or even one agent doing 20,000 different things because they had different whim. You know, that can be challenging, but it sounds like you provide so much to your team members that they just really need to kind of follow the procedures and follow how you organize things and they're ready to go.

Allison: Yeah, I think I figure that my goal is for them to be able to sell. Ultimately, that's their job as their salesperson. So we want them to be able to sell as easily as possible. So as much as I can support that with our systems in place, with our CRM, with our email marketing, with our other things, we can support that. And so that way they can focus on closing sales and taking care of their customers and not trying to come up with a marketing plan for the year.

Michelle: Mm hmm. So do you think that the brick and mortar travel agency is kind of gone by the wayside? I mean, I don't know that I see many any more. I don't know.

Allison: That's a great question. I have a friend in the industry who, prior to the last couple of years, just opened a brick and mortar, which she still has running. And then I have another agency who is similar to ours as well, and they just closed their brick and mortar. They had it for like 30 years. And she said, I just don't see the need for having it. And so it was an unnecessary expense. So I mean, there's a lot of advantages to being in a virtual business. And for us and I guess it depends on the industry and what you're doing specifically, but I mean for us it's great because in sales I can have such a diversity in my workforce. So I, as I add on agents in different states and different areas, we're just really expanding our reach versus in a brick and mortar. Everybody's got to be within like a commutable distance so we can reach the

whole country really easily because there's agents in North Carolina and Illinois and Texas and Kentucky.

Michelle: It's amazing. Yeah. And everybody's working virtually. Yeah, right.

Allison: So that gives us a lot of opportunities to broaden our sales. It gives us, you know, the network and things like that and it allows everybody to be flexible. So we have people that this is a part time job for them and they have a full time job and they can work in the evenings and we can do things on the weekends. And everybody has that flexibility because I don't have to manage like who's in the office at what time. I can have everybody working at the same time and nobody working at the same time. It doesn't like we don't manage hours keeping the doors open and that kind of thing and it's a lot less overhead to not have to have, you know, a physical building.

Michelle: The trade off is that you've implemented procedures and you've implemented these virtual things in lieu of the brick and mortar.

Shawn: Yeah, you have all the outlay for that, for all the technology and the infrastructure that you had to have in place outside of, you know, just the office, you have to have all that stuff, right? So they can connect and all that.

Allison: And you need a really good attorney who understands a virtual business because there's different, you know, logistics and rules and things that you want to have covered. You need a really good accountant because you need to have to do withholdings in different states in every state.

Michelle: Yet even as independent contractors I know Pennsylvania, for example, because that's where we reside. But many states have put into place nonresident withholding on independent contractor wages. It's just in case they're working in different places or if that you have. All these states have different rules, too.

Allison: So you need an accountant who knows the different logistics of different locations if you're going to be working outside of your state. So you just need those other professionals to do all those things because you're not you know, you know your business. You don't know all the professions that you need around your business. So.

Michelle: Yeah, that's one of the things that we discuss in our course that we offer to start our businesses. Is assembling your team and how important it is to identify or at least have it on your short list? These are some of the people that I absolutely have to have now. I got to go out and find them. And you may not find the right one right away. But it's very important to say, okay, yes, I need an attorney. I need a banker that's going to work with me, especially if I need SBA loans or something. I need to have the right accountant. I need to have the right marketing company. Right. Is the marketing company a local company that is not so good and a lot of them are good with online now. But, you know, it's like, what direction are you going in? How to reach on a whole country basis? What does that look like? And making sure you have those right people in place.

Shawn: Yeah. And just like Allison's, business has grown and changed. You know, those professionals may need to change as well. You know, when you first were just on your own, you don't need an attorney for. Well, they have multi-state and no virtual businesses. And now, you know, now you need to adapt and change. Yeah. So.

Michelle: Wow, wow. So anything else you want to add to that people may need to be aware of or something that was like, you know, if I had known this earlier, I would have done something differently. I think one of the things was how you structured your sales teams. That was probably one of the biggest things...

Allison: That was an awesome lesson. Look and learn for your business? But yeah, I think like just setting up, if I would have done anything different, I would have set it up better from the start. I feel like I've always been playing catch up because I never envisioned that this would turn into what it did. I mean, eventually I did. And then now. Now I have, like, huge vision.

Michelle: More of it. Yeah. Bigger dreams.

Allison: Which is why we're building the agency website, because I was like, I want to be able to bring not more than 5 to 7 people a year. And in order to do that, we need more self-done training and I need that training more documented and I need it more formal versus me, just like meeting with people one on one. So, you know, so now I'm starting to see how do I grow to this next level? But I mean, really, I think people underestimate in the beginning. How much planning they really need to do to get those key professionals in place. I mean, even from my chart of accounts on my accounting.

Michelle: Oh now, she's talking accounting.

Allison: Oh, my gosh. Like, I'm so mad. Like, I was during one of the things I did over the last couple of months or a couple years that I don't have as much to do with booking travel. I was like, I am fixing my chart of accounts.

Michelle: Spend some time on it.

Allison: And now I'm looking at profit and loss statements that are not giving me the data that I need. And so I'm using other methods to calculate the information I need because my profit loss isn't really as informative as I need to be because my chart of accounts isn't what it's supposed to be. So, you know, I think that you just need to really set that all up from the get go because although you can change things over time, it's almost like if your business grew as big as you really wanted it to be and if it was everything that you'd want it to be in the future, what foundation do you need for that? Now, don't wait to try to change it as you go, because sometimes those things can be hard. So even if you can't do something in the beginning that you know you would eventually need to do, set yourself up on a path that would be in the direction that you'd be able to add that versus. It's a structure that's like you'll have to totally redo it. Because restructuring that whole thing and some of that is like a good example. That is our CRM, which we didn't have in the beginning. We use

AirTable, which is a great way to submit information and have things in a database. And it was free and that worked great, but it did not give me what I needed out of a CRM and I could have used a CRM with a smaller number of people, but I didn't. And so then when we switched to using a CRM later, I had like five or ten people that really can struggle with using that because that was never part of our process. And so their process doesn't include that. And so now they're trying to redo their habits and trying to get people to redo habits is always a struggle. I feel bad for them because if they would have had that from the beginning, even in our little small scale, they could have grown with that. And now I'm trying to like to have them redo their processes and it makes it harder on them. And that was like, I feel like a mistake on my part. I should have had that set up from the beginning, even on the smallest scale.

Michelle: Now, do you have the same CRM? Like do you still have that same CRM platform? Did you ever outgrow or had to switch to CRM?

Allison: So when we started a CRM, we talked or I talked to lots of other agencies, I talked to industry people, I talked to people that were outside of Disney specifically because a lot of the agencies that sell specifically Disney destinations need certain things. And I didn't want to pigeonhole myself. I didn't want to put myself in something that was going to cap and that I wouldn't be able to use when I needed other things. So I talked to the people that exclusively sold all the inclusives and people who did a lot of cruises. And I tried to figure out what is the best one for everything so that we can expand and grow. And do you know, maybe we end up in destination weddings, maybe we end up in corporate travel, maybe we end up here or there. I don't know. But I want a system that I'll never have to change again. So that's what we did. And that's how we picked our CRM, which is travel focused, but also not too travel specific because I want to have the option to grow.

Michelle: Do all the things.

Allison: And not have to worry that we're going to outgrow our system once again.

Michelle: Yeah, that's some great advice.

Shawn: It is. Yeah. Yeah. I mean, we have to think back, you know, for even our firm, you know, we've had to have different changes in our tech stack. And, you know, you have to have people learn new softwares and new processes. And it's painful. But, you know, it was necessary to move to what we have now.

Michelle: So, yeah, absolutely.

Allison: I think big, think big. When you start thinking where would you want to be? Where could you possibly go? And is there a way that you can set yourself up to get there without having to teach something if it's possible later.

Michelle: Yeah. First, Like, is it going to grow with you?

Allison: Yeah. Is it, does it have the ability to grow with you? Because I didn't really think that way. And I think that that's caused me to have to...

Michelle: Redo some things. Yeah, we're always constantly learning. So don't put yourself down too much. I mean, hindsight is 2020. I say this to everybody. It's always easier to see clearly behind you than it is forward. So, you know, as much as you may say, oh, well, you look into the future and what can we do now? And, you know, the future may not look like that, you know, and they'll be very different. But yeah, we can do what we can do. Yeah. Yeah. So thank you for joining us today, Allison. And I suggest everyone go on to a Magical Memory Planners website and we will provide all that information and start listening to your podcast and subscribe to that because that's a great time.

Allison: Thank you. I appreciate it. Thanks for having me.

Michelle: Alright. Take care. If you find this podcast helpful, then like subscribe and follow us on social media.