

This is an edited transcript of the April 22, 2015 SmallBusinessTalent.com podcast interview titled – [Take Back Your Time and Master Your Business: Azi Rosenblum on Strategic Outsourcing](#).

Announcer: Are you a hard-working, self-employed professional striving for small business success? There is help. Welcome to the SmallBusinessTalent.com podcast featuring candid conversations about successful self-employment.

Stephen Lahey: Welcome to the SmallBusinessTalent.com podcast. I'm Stephen Lahey, and I'll be your host.

Are you a solo professional like me? If so, then I know you're going to encounter, if you haven't already, a supply and demand issue that can slow or even stop your revenue growth. Simply put, you're only one person and you can't do it all by yourself.

Fortunately, my guest on the podcast, [Azi Rosenblum](#), has some strategic solutions to help lessen the impact of the solo business feast and famine cycle that we all deal with. His company is called RemSource and Azi and his team can help you to offload the tasks you shouldn't be performing so you can focus your time and energy on the activities that result in the most growth and profitability for your business.

Azi launched [RemSource](#) in 2009 after observing a significant need for strategic outsourcing in the small and solo business market. RemSource provides an offsite virtual team that can take responsibility for those things that a business owner wants to delegate so they can regain control of their time and create more reliable workflow and results for their business.

As a solo professional services provider, do you often find yourself distracted from the highest value goals you want to accomplish? If so, that's probably because you have no one to delegate your lower tasks to. Of course, you're not alone. As you can guess, Azi has some practical ideas and encouraging advice for you today. I hope you enjoy the interview.

Welcome to podcast, Azi.

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Azi Rosenblum: Thank you, Steve. It's good to be here. Looking forward to our conversation.

Stephen Lahey: First, tell us about your career before you launched RemSource and then what triggered you to become an entrepreneur.

Azi Rosenblum: Sure. The truth is I think I've been an entrepreneur since, like, middle school, when I started my first business. With that said, my professional career actually started with a little bit of a mixed bag. I studied a lot of IT and accounting and wasn't really sure how to put that all together. I finished school at a time when everyone and their best friend had an MCSC and was going into IT services, so I took my blended background and mix of skills and decided to go into general management and operations. Still with a passion for small business, I went through a couple startups where I served in a management/operations type of role. I had a really good time building a couple businesses and learning a lot on the go.

Stephen Lahey: Tell us a little bit more about your company, RemSource, and who you serve.

Azi Rosenblum: Sure. So RemSource was inspired by the typical struggles of your solo practicing entrepreneurs. Being at about 25 years old, a couple years into my professional career, a lot of the colleagues and friends that I had who had decided to go out on their own seemed to be hitting the same wall regardless of what industry or specific trade or skill that they had, which led them to start their own businesses. So regardless of whether we were talking about the IT person, the lawyer, or even the plumber, they all seemed to hit this critical mass where they went from sitting around hoping that the phone would ring to absolutely dreading every time the phone rang and just being unable to deliver on a lot of their promises and really a lot of the quality reputation that they had built up for the first 12, 18, 24 months that they were in business.

So recognizing that issue, I started kind of trying to solve that problem, which is my natural go-to, I see problems, I try to fix them. I came up with this concept of a shared administrative resource that wasn't quite as simple and outsourced as your typical answering service or a third-party service provider that handles things occasionally and looked to create a real in-house feel that was balanced by a lot of the economical and logistical gains that

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you get from making it a third-party relationship through outsourcing.

Stephen Lahey: Today we're going to get the facts on outsourcing for professional services providers. And I'll just mention one thing. Not all of the people in my audience are saying "My phone is ringing off the hook." In fact, the feast and famine cycle that most of my listeners probably go through, if they're consultants, is very common, and part of that feast and famine cycle is driven by the fact that when they're working, they're *really* working.

Their clients demand a lot of them, and outside of their project work they're behind the eight ball, they're time-starved and scrambling and they can easily get caught up in what I would call "majoring in minor things." Yes, they all know about the Pareto principle and they'd like focus on the 20% of tasks and activities that most contribute to having a successful strategy that gets results. But they're just not able to do that in the midst of chaos. They're only one person and "If it's to be, it's up to me" applies.

So, first let's think of their situation in those terms and then ask the question, why consider outsourcing versus maybe hiring a part-time employee?

Azi Rosenblum: I appreciate that framework. There's something exciting and very visual about the picture being painted of the overwhelmed business owner up until 3-4 o'clock in the morning, but there is also a very real, slightly more calm, silent killer of businesses which is folks who somehow keep their business under control but are not recognizing how much that feast and famine type of pattern is impacting them.

To answer your question, the typical considerations and options that people tend to look into when they recognize they may need additional resources is either full-time or part-time employees. Full-time has a very common and immediate gut reaction of it's too much. It's too much money. It's too much time. I wouldn't know what to do and how to keep somebody busy that long. Along with a lot of other considerations like overhead, office space, am I a natural born delegator and manager?

But when you address the part-time employee solution, which is the fall back usually, the issue with part-time simply put is with the

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types of processes, procedures, tasks, and routines that a company like ours looks to support, you have to ask yourself whether a part-time person is really going to properly solve that problem. And one of the things I like to use to sort of frame that is to say let's consider a part-time fire department. Sounds like a great way to save money for your local city or town, but it's a pretty bad idea if your kitchen happens to set ablaze at 3 o'clock in the afternoon.

But when you sort of step back from your business and look at it as a number of processes and try to break down the different parts and where they need to flow properly and where the breakdowns are, then you find that there is often a nice layer of things that really need to be addressed immediately, really need to be addressed within the proper timeframe, need to continue moving forward and without them flowing properly, then they tend to create other issues within the business.

So a part-time solution, may work if you can get over some of the other humps in terms of management, overhead, and whether you have the infrastructure to properly put somebody in place physically at your location. But often after you hire someone part-time, you realize that this will only be part of the solution. And if you really want to get rid of that feast/famine ride and be able to level off your business and make sure that you're not redlining, then outsourcing in a flexible way is the best way to go.

Stephen Lahey: Your company provides solutions that are fully supported from an operational standpoint. But even with that said, I think that there are certain types of tasks or situations where outsourcing just does not make sense and/or we need to really proceed with caution. But then there are administrative tasks where outsourcing makes perfect sense. What's your perspective on that?

Azi Rosenblum: There's a common reaction that people have when they hit a level of overwhelm and they're ready to start letting go of certain tasks, and they can almost let go too quickly. There's another often used phrase that business people tell you, "You've got to spend money to make money." Interesting concept, but highly overused when you're frustrated and aren't thinking strategically.

So there are certainly tasks that by nature of what they are, I would define them as the product or service. Think about what it is that your company actually provides, which as a solo, to stereotype

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your typical solos, solos are typically built around their personal skills, talents, their trade; and the closer you get to the inside of that circle, the bulls eye, that's really what they should be doing.

If you're a solo practitioner, you really need to focus-in on your highest and best use of time and energy, and just push everything else away from you. But, here's the thing, when you get to the core of what you do, if you're degrading the value of your product by tossing task elsewhere or just not handling them directly and not supervising them, then that can compromise the quality of your reputation and your relationships. Anything that would create a loss of quality or delays or cheapen the product or service, you certainly don't want to get involved with. So, reputation, recommendations, referrals, they're always important.

Stephen Lahey:

Yes, and the model that you're talking about kind of takes me back to something that I heard a really outstanding, sophisticated sales training guy, Brian Tracy, talk about. He talked about the idea of the overall business as results production processes, meaning the processes we employ to get sales results and the results that our clients want. He talked about looking at that from the standpoint of the touch points where we really must be personally involved to ensure quality from the customers' perspective and how they are measuring their satisfaction with what they're getting. And I think that's where we really need to stay very focused – at the customer touch points.

I think a lot of us, as solos, we're perfectionists. One of the reasons why we're out on our own, for most of the people I've spoken with who are solos, is, hey, no one can do this as well as I do. Well, yes, there are certain things that only we can do, and those are the things that we need to focus on because from the customers' perspective that level of quality is what sets us apart. But, here's the problem. If we start to focus on all the other things we don't really have to do ourselves, then it comes back to what I like to call majoring in minor things. Even though it may be a comfort level thing for us, I think those are the things you want to consider outsourcing. I mean those things that, if I were to send them off to someone else, would the customer really notice? Probably not. Okay, maybe that task is a candidate for outsourcing.

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Now, before the interview you and I talked about the fact that there are examples you could give about how you've helped a solo professional service provider to grow their revenue, which is something all of my listeners would be interested in. Can you walk us through at least one of those?

Azi Rosenblum: Sure, and just to touch on something you just said a moment ago also. That specific example of the touch points is also critical and something we monitor closely with our current clients.

We had a client a couple years back get feedback and share with us some feedback that we immediately helped her correct that she was almost over utilizing us as a scheduling service. She was face-to-face with a client looking to schedule their next meeting and then said, oh, I'll have my schedule assistant reach out to you, which created a little bit of an awkward moment for the person that they were dealing with because it was like, hey, we're here, I don't need to be passed off to your assistant.

So, like everything else, you've got to use the tool and utilize it the right way. That was a situation where a client kind of felt like they were being passed off and it was not a more personal, more engaged client interaction and feeling.

On the other hand, if a client is calling to cancel or reschedule, they don't need to speak to you. They're totally comfortable with going back and forth over the course of two or three days trying to find a good time slot, a date, that kind of stuff. It doesn't have to be an interaction with the attorney, with the psychologist, and fill in the blank. So you raised a great point there.

But as far as success stories, one of my favorites is a psychologist that we had brought on as a client, probably close to a year and a half ago. And as I often do, at the end of the conversation I asked her how she would define success if we looked back a month from now and we're still working together. How would she measure that this has been a successful engagement? And her particular challenge was that she had sort of a day job in a hospital system, seeing clients in private practice after hours and in-between things, and keeping that machine moving, the appointments set, the reschedules handled, the evaluation paperwork, making sure that people get it and understand that they have to bring it in, that kind of stuff. It was a big challenge.

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So, she defined success as being able to find time to bake cookies with her daughter, which is a non-monetary but very real part of the solo practitioner experience. Many of us go out on our own, start businesses, and are very focused on the end result of independence and financial growth, but there's quite a climb involved in getting there and you can find yourself being the worst boss you ever had as opposed to the free bird you may have thought you were going to be immediately. So as you get there, you've got to make some smart decisions. And obviously, she was very focused on that, but even from a financial standpoint, which is a much more measurable and a spreadsheet related value marker, her ability to be able to just be efficient with her time, to show up at appointments that had been pre-confirmed and organized properly and to find that her time was used efficiently and was something that she could count on was extremely valuable to her and showed her immediate net results as far as billable hours and therefore revenue.

Stephen Lahey:

A lot of us think of psychologists as people who just spend time in the presence of a client, but that's not actually true. They also, as far as I know, they prep for appointments and also do research. They have things that they need to do as part of their profession to stay up to speed. So, I mean, there are these things that are very important to being a professional and serving clients with excellence, but they're not immediately urgent. I think for any solo, finding time for those important, yet not immediately urgent things, is a big challenge and outsourcing can help us find the time we need.

And then you talked about the personal life issue. There are very strong personal implications to not offloading the things that we could offload. As you pointed out in your example, quality time with our kids, our spouse.

So, that was interesting. How about another example, Azi?

Azi Rosenblum:

Sure. So we've worked with quite a few attorneys and financial planners who also have a very similar environment to what we're describing with most solos. There's what you do when you're face-to-face with a client and then there's admin tasks, follow through, prep, research, etc. So our ability to help them not just organize their time around that, because scheduling services is certainly a focus of part of what we do along with the bookkeeping

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services and other administrative support, but their time is not the only thing that they're worried about as far as meetings are concerned. There's also the ability to make sure we maintain that ratio of back office time and project time and that kind of stuff.

But as we continue to push the model of outsourcing and letting go, our ability to also take certain internal business processes off of their desks is extremely helpful. We, again, as solos, we are perfectionists; and if you've made it this far, then it's because a little bit you're a control freak, and let's be honest about it. But you're dedicated to your clients and you're dedicated to quality, but you probably hang on to things that you haven't even recognized are defined patterns—your client on-boarding process, your contract delivery process, your proposal process, things of that nature. So as we continue to work with a client and dig deeper, we can get some of the customer service-esque type of activities that they're going through. Basically, the repetitive conversations, repetitive requests from clients that can easily be documented and delegated.

Also, internally, certain touch points where if every time certain triggers are hit in your business a four or five step process that you have already defined and refined has to take place, we continue to ask our clients why are you still the only person that can do that? What would be the benefit and the impact of you not doing that anymore and instead spending your time on something else and having somebody else take care of that more quickly?

Stephen Lahey: One of the things that occurs to me with all that you're saying is that you're really a business process consultant. Isn't that true, Azi?

Azi Rosenblum: It is, and it's a very important aspect of the way that we provide our services. Part of what we deliver to our clients and it's almost a less tangible and less clear value that our clients are getting on a regular basis is that we bring them the structure they need. We look at their businesses, we look to implement and refine processes, and we are sort of making sure that they trust us to the extent that they're able to get comfortable with us so that we can help them build the outsourced administrative side of their businesses.

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So there's no question about it. We're not just looking to sign folks up and charge them a monthly rate and deliver a cookie-cutter service. We believe that by engaging with our clients, we become partners in the success of their business and we hope that we can deliver them results, financial and other.

Stephen Lahey: How do you approach the assessment process, as you're having an initial meeting or two with a client?

Azi Rosenblum: Over the past six years, after many versions and revisions of how to best engage clients, we have come up with a process that's worked really well. We organize our services into four main categories – communications, customer service, scheduling, and business process. And we use those umbrellas as a guide to sort of run through how are you running your business? What are your greatest needs? We then create an initial focus or an engagement period, a trial period, where we're focused on those specific things. We're letting our client kick the tires and we're getting a sense of what's really going on within the business.

At the end of that trial engagement, we then set a monthly rate. A flat rate, which is based on a certain expectation of the types of activities we'll be responsible for and an estimation of the volume. And from there, it just grows. I say it all the time and I mean it, this is meant to be an investment. If you're spending a thousand a month with RemSource, then this better be putting three or four thousand in your pocket. If this is just a cost and it's not buying you any results, then there's something wrong.

Stephen Lahey: Great approach, I like it. As we wrap up, I'm sure that a lot of our listeners would like to connect with you online, Azi. How can they learn more about you and your services?

Azi Rosenblum: So our website is open 24/7. That's www.remsource.com. Also, I am searchable on LinkedIn, Facebook, you name it. If you Google Azi Rosenblum, you'll find us. And Azi is spelled A-Z-I.

Stephen Lahey: Thanks so much for joining us on the podcast, Azi.

Azi Rosenblum: It's my pleasure. Thanks for having me.

Stephen Lahey: And to our listeners, thank you for spending some time with us today. If you like what you heard, I encourage you to visit

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