

**Ep #172: Sherrie Sokolowski - Leveraging Up with a  
Rockstar Assistant**



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**Dr. David Phelps**

**[Dentist Freedom Blueprint](#) with Dr. David Phelps and Evan Harris**

## Ep #172: Sherrie Sokolowski - Leveraging Up with a Rockstar Assistant

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David Phelps: Hi, this is Dr. David Phelps. I recently did a special webinar presentation to my Freedom Founders members. It was so well received and really something that I believe is a huge leverage point for anyone of us who are in our own businesses, our own practices, trying to make the next step or the next level that I thought it'd make a great podcast interview. So, I just want to give you a little preliminary look into this and so you realize you're not on a webinar but you're listening into some great content. I hope you'll enjoy this particular segment.

David Phelps: Well, hello everyone. This is Dr. David Phelps of the Freedom Founders Mastermind community and the Dentist Freedom Blueprint podcast. I've got what's going to be a really high value interview today with a guest who I have known for quite a number of years. This is going to be a call that you really want to take some notes on, but also take some action on, because I know in my own life, the principles and strategies in the leverage points that

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this particular asset will offer you is incredible in terms of actually transforming your life. Taking all the things you want to do in your life, all of the tactics and strategies and business building and investing, and even in your personal life where you're trying to multitask so many things. This is going to change your life but you've got to take action. The reason why most of you have not taken action is ... Just like I didn't take action for many years ... I didn't have a roadmap. I didn't have a blueprint. I didn't know how to do it so therefore I defaulted to taking no action. This is your chance to actually take that action.

David Phelps: So, without further ado, let me introduce my good friend and my guest interview today, Ms. Sherrie Sokolowski. Sherrie, how are you doing today?

Sherrie: I'm doing fantastic David. How about yourself?

David Phelps: Doing great. So glad to have you on today. We're going to jump into some really great stuff that really gives a little bit more insight into what this is all about and what it means to our guest on the podcast today.

David Phelps: Alright, so tonight's topic is something that I talk about, my team talks about. It's a topic that we talk about, we give a lot of verbal acknowledgments to. It's an easy thing to do and it's also an easy thing not to do. It's something that, I think, a lot of us for sure we struggle with and I'll raise my hand high and say I have always struggled with this and I'm better but I have to be very intentional about how to implement this strategy, this resource, this leverage point into my life and why I think it's so important for you. That is finding the right person to become your executive assistant. We'll define what that means tonight. We'll find where the leverage is.

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David Phelps: Those of you who are on the call this evening and I don't have the ability to set up a poll right now ... I'll just ask you the question ... How many of you right now work with an assistant? I don't mean in your dental practice, you use assistants there, but how many of you work with an assistant at some level that helps you manage your personal, business, real estate side? Anything like that? So, Eric, you do. Jim, how about you? John Harrison, how about you? Did you hear my question?

John Harrison: No.

David Phelps: That's okay. Tom Brewski, how about you? Are you using any outside help?

Tom Brewski: No, I'm not.

David Phelps: For any of your stuff? Okay. And that's probably going to be pretty much the answer across the board. I'll say very few have done that. I'm a part of different groups and one of the groups I'm a part of is Dan Sullivan's Strategic Coach group. The first time I showed up there, what was told to us by Dan Sullivan ... Dan asked the same question, how many of you are currently using an executive assistant to help you with your ... Manage your personal business, investment side, whatever. I would say at that point, maybe 15% to 20% raised their hands. He looked out and goes, "Well, if you're not doing that or you're not going to do that, you have no business being in this program." What he was saying was, for us to move to the next level, to transform ourselves from where we are today, into anything different ... Personal life, business life, anything ... We can no longer do it by ourselves. But what's our problem guys and gals? What's our problem? We're control freaks. We are control freaks.

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David Phelps: We have been taught to be very detail oriented in everything we do and therefore handing off something that we used to multitask and manage, it's very hard to do. It's a scary thing to do and so what do we do? We don't do it. We talk and talk and talk about it and then we just don't do it. It's my pleasure tonight to introduce you ... A good friend of mine, been a good friend of mine for about eight years now, Sherrie Sokolowski. Sherrie, how are you doing tonight?

Sherrie: I'm doing really good David. Thank you.

David Phelps: Sherrie is very humble. She's quiet spoken but she is super powerful. What I mean by that, her super powers are in her ability to do the things that most of us can't do. She can organize, she can systematize, she can become or has been and is the other half of the brain for some very high profile people. In her background she's been the executive assistant for the CFO of a real estate company, something we're all familiar with, president of a non-profit organization, two vice-presidents, the general counsel and a president of a global performance improvement company. Then, I guess Sherrie you can tell me, but how your ideal position was when you and Bill Blazer came together some years ago. Bill Blazer, most of you probably know, but he and Dan Kennedy formed a partnership back in 2004, when Bill became the operations guy running the business. Dan, at the top level, bringing top level thought processes, but Bill was the driver.

David Phelps: Well, like all of us, Bill, as smart as he is, as capable as he is, only has so much harness power, that is time power, in his life. Right? Eventually, we all run out. So, I don't know how you guys came together Sherrie but I got

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to watch, a little bit on the inside, to watch how this great team, Sherrie and Bill, worked together. Bill was, what I call, front stage, out in the front and Sherrie's behind the scenes just creating the pathway and getting the organization there and being the other side of his brain. Something that's so powerful that I wanted to bring this to you tonight. That's going to be my lay of the land. Sherrie is also very faith based, which matters a lot to me because I know where she comes from, where her core is. She's a spouse. She's a proud mother of a beautiful daughter who is now ... Is she now five Sherrie?

Sherrie: Pretty soon. In about a month and a half.

David Phelps: Coming close, coming close. Anyway. Sherrie ... Now, back to what Sherrie does today so that it mixes with her ... By the way, you told me that Kyle, because of what you're doing and the way you guys work together, he is now able to give a whole lot more time at home. Right?

Sherrie: Yes.

David Phelps: He's not out ... So you're taking, what you know how to do, which is also event planning. Sherrie also, basically, ran all of the Blazer-Kennedy major events for all those years as well as Bill Blazer's sidekick. I know how it is. Just like with my team, with Lindsey and my team, I pretty much just show up and all this other work's done miraculously. Well, that's what Sherrie did. Sherrie walked around and made sure everything was laid out perfectly. She has all these capabilities. Sherrie, I could talk on forever about you but I'm not going to do that because that's not the point of tonight's webinar. What we want to do is let you take us down the path of what you know having a great executive assistant can do for anyone of

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us, by your experience. I can certainly testify because I have Lindsey full-time with me at this point. Also, the who. How do we find this person? And then the how. The scary part, even if we have the wherewithal to get the who, it's like, how do we hand this stuff off? Now, I'm in another place where I don't know what to do. It's hard work. I don't know how to.

David Phelps: In all of this, in all of your experience, Sherrie has also created a really superior, and I have it, a product which she put together a few years ago based on her experience, which I'll just let you know right now, it's no brainer. I'm not here to do sales but I'm here to help all of you and this is one thing that if any of you want to do anything in your life to take to the next level, you'd be foolish not to go down this pathway that Sherrie's laying out. So, Sherrie, let's jump in. I know you've got this laid out in an organized fashion. You know you're talking to a bunch of people just like me, so speak our language. I'm going to let you run with it and then we'll likely have some time for some Q&A on the back end.

Sherrie: Absolutely. Well thank you for that wonderful introduction David. Hopefully you guys can hear me okay. I'm using my phone for the audio.

David Phelps: Yep.

Sherrie: Okay, great. So, I took a bunch of notes of things I want to talk about as we're walking through this tonight based on how you introduced tonight's topic. So, the big thing is why. Right? Why would anyone who's looking to this and watching this thing why is it important to hire a, what I call a rockstar, executive assistant? Why is that important to me? Why do I need a vast amount? Why do I need to

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take the time away from what I'm already doing every day to find that assistant when I'm okay doing alright everyday business?

Sherrie: To answer that, the reason why is going back to a couple of points that David said in the very beginning. That is, if you're going to take your business to the next level and be able to expand your business, be able to open up another dental practice, or do more real estate investments, or anything along those lines that going to take more of your time, what better way to free up time than to take some of the day to day tasks that you do every day that are sort of mundane or administrative or things that you don't necessarily need to be in control of every day, and put that on this rockstar assistant that you would hire. That's one big reason why.

Sherrie: Another big reason is let's say you don't have any plans to add anything new to your business right now but maybe down the road, however, your biggest challenge that you're having is enough time in the day to do what you're doing now. Enough time to be able to do the business that you're currently working in or enough time to be able to spend time with your family. We're quickly approaching summer, school is about to let out. There's probably people on this call who have kids and their kids want to go and do something fun with them now that they're out of school, who want to take more family vacations. Anything along those lines. You can't do it if you are in on your job, working on your business more than the hours that you should technically be doing. So, those are the big main reasons why you're going to want to hire a rockstar assistant.



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Sherrie: The third thing that a lot of people don't really think makes the difference, but this third thing is really where the rockstar in the executive assistant comes from. That is when you find that right person, that person's going to be able to bring to the table, skills, knowledge, some insight on your business, and what you're currently doing that you wouldn't have thought of yourself because you're so busy day to day, working at what it is you're doing. You don't have time to think about how to better be more efficient in what you're doing. Maybe, you really want to add something new to your business but you're just not quite sure what. This rockstar that you would bring in could help you with that.

Sherrie: I've done that when I was with Bill. I'm still, honestly, with Bill virtually. We started together in 2005. He leaned on me for so many things and it helped him be able to take certain things to the next level, especially in the event industry. As well as, it allowed me to grow. Going back to the question of how did Bill find me, he'd never had an assistant before. Before he partnered up with Dan Kennedy, he was in the retail industry. You know that B2B business. He had employees and things but he never really had the need for an assistant. It was brand new for him. He just put out, like everyone else does, through staffing industries and temp agencies and things like that for them to seek out who they wanted. He went through interview after interview after interview and finally we met. We had ... I think it was one of my longest interviews I ever had in my life. It was six hours.

Sherrie: He just explained to me all of the things that he needed and that he wanted to treat that position as an apprentice position, mainly because he had never had an executive assistant before so he didn't really know what needed to

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be done but he knew he needed help. He was drowning in so much work. He knew he wanted to take it to the next level. He knew that he just needed to build a team to do it. It's all about building the right team. Having ... Cause your rockstar assistant is really ... Everyone's heard of the terminology before, your right hand. Or it's probably not political right statement to say but your work bride. It doesn't even have to be a female. It could be a male. Whoever fits that category but it's the person that when you're not at home, they're your right hand. Not your vice president. Not your CEO. The person that you're going to feel comfortable in handing your day to day tasks and let them manage it for you.

Sherrie: You would essentially still be the decision maker but the things that really matter to your business being financially responsible for things. This person can get everything up and running for you. So, instead of you doing all the legwork for that particular project or task, that person would do it. They bring it to you, say "Here. It's done." How many hours would you have spent on that versus this person who, quite honestly, is probably a lot more efficient at certain things than you would be? So, that's another great reason why is because the person, if you seek out the right one, the rockstar, they're going to be a lot more efficient at particular programs. PowerPoint, if you guys are doing PowerPoint presentations, if you're doing any letters or any proposals, anything like that that is admin tasks oriented, dictate it to them. They can take care of it and it'll be a lot less time off of your hands.

Sherrie: The how and the who, David, I want to say is probably a combination of two things. I say this, I share this a little bit in the product that I shared with you a while back and how you go about finding that right who really will work hand in

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hand. So, there's multiple ways out there in the industry of finding an employee. You've got all the online sources. You still have the old employment seekers that'll go out and job hunt for you, the job hunters and things like that. The old ways of posting ads. Indeed, all those other online places to do it but you always need to keep in mind the who when you're doing the how. Here's a great example of what I mean by that.

Sherrie: In the marketing industry, we are trying to find a copywriter and you go on to ... I know I'm probably saying the wrong words here, but it's a cheap way to go out and go online and find someone to do something for like a dollar a minute. Right? Well, it's because the quality of work that you're getting from them is something that's going to be quick. So, they're ... Back in the day when Bill wanted to have a lot of videos transcribed, we would hire someone who was ... We would pay a dollar a minute to transcribe it cause all they're doing is typing what's being heard.

Sherrie: It's all about that who. If you really, really truly want that rockstar assistant, then you're going to want to take the necessary steps to outline what that ideal person's skillset is, what their personality is going to be needed, because, quite honestly, that is truly what's going to matter. If you've got someone ... If you're just strictly looking at someone's resume and their skillset and their job history and you're going by what they've done and you're making a judgment call just based on their skillset and their experience without meeting them, then you're putting the cart before the horse because their personality might not match you. So being that right hand rockstar assistant, you guys really, really need to blend well, mesh well. It's just like going back to the old term of your bride,

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your significant other. Your guys' personality needed to work well in order for the marriage to work or the relationship to work. Same thing really when it comes to rockstar assistant because if you guys aren't on the same path, in personality and in likeness, then you're going to constantly butt heads at some point through the process, especially when it gets hectic and crazy.

Sherrie: So the who, what, how finding them, matters. I go into this a little bit more in detail in the product that David mentioned because the process of putting together your job description and your profile ... I think I refer to it as the profile ... So, the job profile really is more inline with what you ideally want this candidate to do for you. What I mean by that is, like with Bill for example, when he first interviewed me, he said, "Sherrie, I've never had an assistant before. I don't really know what I need. I just know that I need somebody." We worked through the process. Fortunately for his sake, because I was looking for that ideal position, I was looking for an apprentice ... I was the executive assistant, I'd been one for over 15 years before I met Bill. Every employer I worked for, I would hit a glass ceiling in that position. I'd come in and I'd make his life better, or her life better, make the position what it was as best as it could be, get everything organized, have everything working well and then, it was like, "Okay, what's next?" And I really wasn't a 'what's next'. So, unless it was a position I wasn't interested in.

Sherrie: I was constantly looking for a challenge and someone to help. So, when I ran into Bill, it was ideal for me and him because we could constantly add on. Right? That goes back to the who and the how. If you can say to yourself when you're starting this process, "Right now, I have a list of these particular topics or projects that I know I would

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want my ideal assistant to do for me but down the road, these particular things, I'm going to want also to have help on." So that when you're interviewing that person or persons to see if they're a good fit, you can keep in mind what the ideal goal down the road. Do you think they could actually work themselves up to that? When you're doing that, and you're going through and you create your perfect job profile and qualifications that you're looking for, all of those pieces and parts are outlined throughout this product. Because if you do it properly, from beginning to end, you're automatically going to eliminate people who don't qualify.

Sherrie: Another thing that people have a concern when you talk to them about ... David, you've probably had this conversation too, is I don't have the time to go through all these resumes. Well, if you do a job profile accurately and exactly how you want the job to be presented, only those qualified applicants should apply. A great way to really filter through some of that is to get them to go through a little bit of hoops in the beginning. So, instead of just saying 'submit your resume,' have them answer ... This is a little trade secret ... This is what Bill did to hire his marketing manager back in the day. When we sent out the requests for job applicants, he did an interview process through the phone. He set up a recorded phone where they're were two or three questions that a candidate had to call and answer. If they answered those particular answers to the tee, then they got called in for an actual interview.

Sherrie: There's many different filters, per se, that you can do. You can have when they apply and if you have them do an application or have them submit a resume a certain way. If they don't follow those directions, then they

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automatically eliminate themselves from the process of even being considered. Doing the legwork, I guess you could say, and taking the time to do this upfront, is really going to eliminate a lot of headaches at the end because you just don't want to rush through a job description, post it wherever, spend the money, spend the time to do that, only to get hundreds of resumes from people that are qualified, do interviews with people that are wasting your time because they just can't meet the demands that you know you're going to need from them. If you filter out the process, make them qualify from the beginning, then that will help you narrow it down.

Sherrie: Another thing too that I like to warn employers about is when you're doing reviewing of resumes and you're checking through the qualifications of an applicant ... I know back in the day when I worked in the corporate world, they used to say to me, "Why did you have so many jobs in the beginning?" Cause I had a couple in the very beginning of my stages and it was, quite frankly, I was trying to find myself and I knew those positions weren't for me. Once I gave them that answer, they were satisfied but I had gotten to the point where I was actually able to be in person to ask that. Some people will look at the resume and see that they've only been in this position for a couple of years and then they move to this one. They were there for a couple of years and then they moved to this one. Well, I don't want that because that means they're only going to stay with me for a couple of years. That's not necessarily true.

Sherrie: If they fill out their resume in a way and reply to you and apply to your position in a way that shows they actually have the talent and the skillset for all that you're looking for, then you can ask them the question to why did you

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jump from job to job. Finding a really good rockstar, that person's probably going to say to you, "Well, that company just didn't have enough for me. I outgrew that position. Or, it wasn't challenging enough for me." Something along those lines. You may say to me, "Well Sherrie, wouldn't that be a negative for me?" No. If you're looking for just an admin, a secretary, someone who's going to answer the phones, then yeah. But if you're looking for that true rockstar employee who is going to be able to grow with you and help you grow by opening up this pathway that David was talking about earlier, where you guys can collaborate together at some point when you earn each other's trust and you know you're reading each other really well through this, then that person is going to stick around and stay because they know they've got something to work towards. They know that they have a future with you and they're actually dedicated now because they're ...

Sherrie: It goes back to ... Goes actually to this next point I want to make is that if you find that right person, that rockstar, they are going to be invested in you as well as you investing in them. That's the thing is that someone in that level is always looking for. That's what I looked for. So that's why when David said earlier you may have found your goal when I found Bill because it was truth for me. It's like, constantly, okay, what's next for me. When I got to that position, I did the typical EA job. I did his letters, his appointments, his phone calls, all of that but then he brought in something really huge for me that was huge for them and that was the event planning part. Everything else just added on from there and they really, really ... The only reason I left that and went out on my own was because Bill sold the company.

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Sherrie: I didn't like the way it was going, so I left. Otherwise, I would have stayed. There would have been no reason for me to go out on my own and find something else because I liked what I was doing. I was invested, he was invested in me, and we were continuing to grow. So, the why, the how and who, all of that really matters as far as ... What's the real reason you want to have a rockstar assistant? It's because you want to have time back. You want to be able to dedicate your time to something else other than the mundane things that someone else can do for you. It's very similar to what I tell people when they hire me for events. Do you seriously want to be working with speakers? Do you seriously want to be working on finding something for your event? You seriously want to go out and find your hotel when someone else can be doing that for you and you could be focused on the marketing and filling the seats?

Sherrie: It's just like this. It's just like your every day business. Everything that you're doing in your business, you say to yourself, if you've got goals written down and you take the time to have your to do list for the day, end of the day, did you get through all your to do list? No. Why? Because you were spending too much time on other things that truly didn't matter but they had to be done. So, those all really bring to the head of what is the real reason why you need to hire a rockstar assistant.

Sherrie: Dave, do you have any questions you want me to-

David Phelps: Yeah. This is great Sherrie. You laid it out really, really well and I think it's particularly helpful to have people hear your story. And from your side, being a rockstar assistant in your own right, even before you came to work with Bill, but to see through your eyes what makes you tick. That



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you wanted a challenge. You wanted to grow with somebody who was going somewhere. You wanted to be with someone who's on a mission and to even compliment and be part of that force, doing so in a way that you utilize your skills, your unique ability to that person, in this case Bill, your last great partnership that you will. I think that's a key.

David Phelps: Too many times I think, and I know I've had this perception, but an assistant ... Again, I don't think this way at all today but an assistant is someone who is beneath my skillset. Are you kidding? There's stuff that, in my case Lindsey, does that I don't have a clue how to do. I wouldn't do half as well. Sherrie, same thing for you and where you were with Bill. We sing your praises and go thank goodness there's somebody that can do this stuff that I have no desire and no capability of doing. We have to get out of our heads this idea that an assistant is someone, for dental offices, it's someone who ... A lot of times, it's just managing the patient a little bit. Yet, there's rockstar dental assistants. If we empower the right people and show them there's no glass ceiling, there's no limit to the talent we can get.

David Phelps: One of the questions that I have for you is when you came on with Bill, I'm assuming, that you came on with him on a full-time basis, even though he didn't really know how this was going to work out, exactly how this was going to ... He just knew he needed help. Did you come on full time initially with him?

Sherrie: I did.

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David Phelps: And did you work with him as an executive assistant in house? That is in the physical office? Or did you do some virtually or some of both? How'd that work out?

Sherrie: Well, I did it actually in his office. Now, that he's only doing credit claims work, I do it virtually. There's a huge difference. If you want me to talk about that, I can.

David Phelps: Well, here's why I think you should. One of the things that some of the doctors are thinking, and I get this, right now they're surrounded by, typically, a lot of women in their office. Okay? There's assistants, there's hygienists ... Harrison's laughing. He wants to go back. He can't stand it and he wants to go back so badly. But we have all these women that are great support people in different roles. Typically, not very good at empowering them cause we try to do it all ourselves but still we have them. Many times there may be an office manager or a quasi office manager. So, some of the doctors are thinking, "Well just to add on somebody else," in this case an executive assistant, "This sounds like a luxury that I shouldn't even do. Don't I have people around me right now that can do the things that we're talking about."

David Phelps: So, maybe you could talk about that and whether this executive assistant that we're talking about could be, should be in their office if they have a physical office. Or how the virtual part works cause my assistant's virtual. I don't have an office anymore. So, speak to some of that.

Sherrie: Okay. There are pros and cons, of course, to both. The in person and our virtual worker. I actually have a little bit of information about that in the product too where I did some interviews with some other folks who are experts in the virtual assistant world back in the day. They talk in light

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about how virtual assistant work in a good way versus a bad way and then what are the things that you would necessarily have to work at. So, again, this goes back to the how and who. If your who is a virtual assistant, then the way that you go about interviewing for that virtual assistant is going to be different than the in person.

Sherrie: The personality is still going to matter because you two will still be working together. It actually, I would think, more so it matters more virtually than it would be in person in a way. That means a virtual person really needs to be someone you do not have to micromanage. Right? That person has to take extreme initiative to make sure things are getting done. They follow up with you if they haven't heard from you. They check in with you to let you know where they stand. So, it's gotta be even more so reliable person and someone that, if things aren't going quite the right way, you two can get along easily to say, "Hey, what's going on? I haven't heard from you. Or I need to hear from you more."

Sherrie: I'm going to start with the pros for a virtual assistant. Virtual assistant, that person can work anywhere. It doesn't have to be someone in the same state, so if you find someone or know of someone or someone referred you to somebody who is just fabulous and fantastic and you want the opportunity to be able to work with them to see if it's going to work out, then virtually, that's the best option for you because you don't have to worry about moving up that person to your state or you know making sure that they're close enough to your office, you know, all of those things. So that's a really bit plus because it doesn't matter where that person lives. The only thing that matters is you know the capabilities for them to be able to work. Internet, reliable Internet, computer, all of the

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programs required, phone, all of those kinds of things because you definitely want to make sure that your virtual employee has the equipment they need through your company.

Sherrie: Don't have them work on their person computer. Don't have them work on their personal cell phone. Don't have them work ... Of course, they can work in their home. They can work in their own ... My office here is one my bedrooms in my house. The phone that I'm on is the only phone I use. Nowadays, people only use cellphones. They don't use landline. But the reason why is because let's say the employee doesn't working out. Then what are you gonna do? They've been using their personal stuff. Are you sure that they don't have your work stuff on their personal stuff and things like that.

Sherrie: The other pro with a virtual assistant is that you can keep your cost down. So virtual assistant usually means that you can work with them on an hourly type of basis and it's a lot more flexible and it kind of goes along that back in the old days when virtual reality wasn't a big thing, flex time was the old words that people used to say back in the day to us is you can have flex time where you don't have to work a full every day at the office. You can work some in the office, some at home, or something like that. You have flex time. And with virtual assistant, you can have them keep track of the amount of hours that they do with for you and you let them know up front "I'm only interested in these amount of hours from you per day or per week."

Sherrie: You can agree on ... Usually, virtual is a per hour basis. Every once in a while, you could probably find someone where you just say "I want to pay you a flat amount and

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whatever work I need you I get" but nine times out of ten, it's usually an hourly employee. So you can keep your cost down and you can have to worry about overhead as far as having an office for them to come to, any other additional equipment and so many people nowadays love to work virtually so that they can be at home with their family to pick them up from school when they come home or see them out on the school bus when they leave from school or all of these other kinds things that you get to do when you're working from home versus having to drive in a car to drive to an office, be in traffic, and come home.

Sherrie: So there's those pro things that the employee themselves really enjoy the virtual work. The con that I want to say in working virtual is it could be a little difficult for the advancement portion that I was telling you about to come into play. It could happen but it may be a longer process because of ... When you're in person, you see each other just about every day and you can see how well that person is progressing or you're there in person and you can instantly hey, I can have her do this for me because you're automatically thinking of it. That person's right there. So constantly being able to put work on that person is going to be easier. So when you have a virtual, it's a little more difficult really to be able to do that. And if you want to kind of like brainstorm or something, then it's not something that you can immediately do because, and this gets explained in the audio portion of the product that most virtual assistants are virtual assistants for a living.

Sherrie: So they're not usually dedicated to just you. They usually will say I'm a virtual assistant. I'll dedicate the amount of hours that you and I agree upon and they'll work those hours but they're also working for someone else. So you got to keep that in mind too. That's the really big con are

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those two things. There's other little pro and other little cons too, but the big ones are probably a little bit more cost effective for you to work with someone who's virtual and then a lot of people really love to work for virtually. And then the cons are ... The big ones are the fact that the advancement of being able to throw instant kind of work to them or brainstorm with something right away on the spot is going to be a lot harder to do with someone who isn't there physically. So those are just the main things with virtual.

Sherrie: As far as in person goes, the pros are ... It's really all over the place because of all the things I just said about the cons with the virtual, but you can have that person there and anything that just may come up or you're like ... You're finally gaining that trust and you're like hey, can you come on in here? Can you have me with this? Can you work on this? Billy used to do it all the time.

Sherrie: And the other pro that a really really good rockstar assistant can do for you is, depending on the layout of your office, the ideal position for that person to be is right there, whether they're inside your office, on the other side of the room, or right outside your office, but within earshot. Here's why. When Bill was in his office, I was right on the outside and he would be on the phone talking. Because I had been in EA for so many years, I had trained ears where I could be working, doing something, and listening what he's saying and if he's talking with someone that has something to do with his schedule or something that I knew the answer to, I'd be like no no no Bill or yeah yeah. Because I'm like ... We've got each other trained, right? So I can hear and be able to jump in on that because I'm physically there and if he's got something that he needs to immediately have changed

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out wants to personally ask me, he'd just call right into his office or he'd come out to me and on the top of that, one of the big key things that a executive assistant does for you is they're the gatekeeper.

Sherrie: And this comes into what you said earlier about other people in the office. So a really really good rockstar EA is a really really good gatekeeper, not just for others outside your office, but others in your office. Right? So if you give but you have to ... And this also goes along ... If we have time, we'll talk about this too, is if you give everyone else ... If you let everyone know the plants you work with, the people that you work with outside the office and the people in the office, if you let them know that your executive assistant is the gatekeeper and you stand by that. You stand behind that person as the gatekeeper. Don't back away from it. Then others will respect that too.

Sherrie: So that basically will mean there's an assistant in your office or your patients or anyone who's trying to get at you in the office. When I don't have to explain better, they're not ready to be seen. Your gatekeeper will say whoa whoa wait a minute. Can you come over here for minute? Just like those ones you see on the movies. Right? You don't have an appointment kind of a thing in the movies, right? That's the gatekeeper, so those are things that are all the pros of having someone in the office. Now, you can do a little bit of both. You can have someone in the office for a little while, so a few hours a day or a couple of days a week and then the rest of the week, they can work virtually.

Sherrie: So you can go do a bit of both and you don't even have to have ... You asked me this question if I worked with Bill full-time. Yes, because he needed it. What he wanted me

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to is I was in on all of the meetings with every key employee. The marketing meetings ... Really marketing is the only thing back at the time, but I was in on all of those meetings because it was important for me to know the business. He did it for two reasons. He did it so I could learn the business, actually three. He wanted everyone to know his gatekeeper, that during the meeting, if they needed something from Bill later, they would say "Okay. Sherri, you got that right?" And I'd write it down and I'm like yeah, they need to come to me, not interrupt him.

Sherrie: And the third reason was so that I could know what needed to happen when it needed to happen. So it was another way for me to have that pathway that you talked about earlier, David, where before, he had to control all of it. So put yourselves in that position. In your business you're doing now, where you're like "I'm responsible for all of this?" Wouldn't it be great to have a shadow for a bit, to be able to categorize my deadlines, things that need to be met when ... You know, appointments that need to be made, things I needed to worry about taken care of, they would advise it all for me. Let that person take care of that all for me so that I can focus on the things that have to happen, not when they need to happen, but the things that have to happen.

Sherrie: So if anyone were to ask me what would you recommend, I'd say if you really really want that rockstar executive assistant, in person really is the better way to do it. Virtual's are great for task goers, right? If you've got things that need to be done, like if you've got presentations or proposals or a PowerPoint, you know, a task that need to be done, those things can be done by a virtual assistant with no problem, but if you really want to focus on what you said earlier that Dan Sullivan said



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"Who here in the room has an assistant?" And those that didn't, he'd also then say "Well you're not ready for the next level." If you honestly are ready for the next level, then you need that rockstar who's gonna help you get there by taking all of those things I just said, not even for you, and if you get the right rockstar helping you and just brainstorming about how you can get there and how they can help you get there.

David Phelps: Because those that experienced as you are, as you were before you even started with Bill, Sherri. You take away a lot of the issues that we have and it's like well how do I offload? How do I start offloading you? You work with Bill strategically, so okay, you probably started with Bill by saying "Bill, make me the list." Well what's the list? The list of all the stuff you're doing right now. Make me a list and you probably could whack it in half and okay "Bill, I can take this whole bottom half. I'll take this half. Let's just start there. Okay?" How? "Well. Bill, trust me." You know? And then you just start getting in sync. The other thing that I found it with a really ... You know, again, this is something that built over time, the trust, communication between the two of you, but once you really start to get that sync going, that rockstar assistant can start doing so much of the communication for you. Your emails, responses back to various people. I don't get my email anymore. Lindsey all that stuff and filters it out so only a few thing do I need to deal with and man, even then, it's a quick ...

David Phelps: We do a briefing. Three times a week, we do a briefing. Monday, Wednesday, and Friday, we're briefing in the morning and it's usually, for us, it's less than 15 minutes. That's how she twiddles everything down to 15 minutes and boom, all sorts of stuff gets handled and it's off my

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plate. I don't even have to look at it again. So here's more things that might help. It might be a big step, Sherri, for some people. Well, it would be for me if I was just getting ready to think about this, you know, okay, full-time, you know? I just ... There, right now, I want to try this but could I step out on a part time basis and find somebody who might be in that arena or maybe they could work part time for me and part time for somebody else as she alluded to. That's in house or virtual. Well, that might be a way to get this process started with those... That's a little too scary for me. What'd you think?

Sherrie: Yeah, it's definitely possible. It really kind of goes back to what I said earlier. It's the who and the how, right? So, one, the best thing to do is to kind of start making a list of the things that are really tedious. Things that are taking the most of your time that you know right up front, and it's gonna be difficult no matter what, but right up front, you know, okay, it won't be so hard for me to let go of these things, right? And then you make that list and you make another list of okay, once they know they're secure with this, I can give them these things and that's gonna help you kinda get your job profile together in the ideal candidate you're looking for and then you can ...

Sherrie: Here's one I'll throw at ya, okay and I learned this because back in the old days with Bill, you can test it. So test your job profile and your ad and things like that just to maybe one or two sites and post it part-time. Post it to see if you got a part-time quality candidate. Just because you got it out there doesn't mean that you really have to follow through with it. You know? If you do full-time on a couple of sites, you do part-time on another, or you do a different type of job profiles with part-time on one and you just do a slightly adjusted profile part-time on another site,

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there's nothing wrong with that. In fact, if you get a candidate that says "Hey, I noticed that you had a couple of different job advertisements," that's telling you right there that person is really really seeking it out, right? It's gonna tell you that person that takes the initiative and they're are some things that kind of puts them in the qualifying candidate.

Sherrie: So to answer your question, David, yes, it is possible. Now, the but to that or the con, if you will, to that is quite simply the same thing with the virtual. If you want that person to eventually become full-time because they have that skillset and you're ready for that next stop, you will want to make sure that you tell them that during the interview process. Say "Look, I'm looking for this right now to feel it out, see how this is going to work, and find out if I need to make adjustments." Be completely transparent with the person because what's gonna happen is if you get that right candidate and you don't tell them and you go through process, all this time invested, money invested, and you raise payment next week of turning them to full-time and they say "Well, wait a minute. I didn't know you want full-time. I can't dedicate full-time." Then you gotta start over if you really need that full-time person.

Sherrie: So yes, you can start part-time but just let them know. So what Bill did and since it's been so many years, I'm gonna freely be able to say this. So when I was looking for a new job, because I was currently working somewhere else and I had hit that glass ceiling there. I was not happy where I was. The president had changed and I didn't really like the way things were running so I was still doing the job but I was looking and when I got this interview, Bill had said to me "Look. Heather hadn't had an EA before. I

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don't know what I'm getting myself into. I want to hire you full-time but I can't agree to the salary you want." Okay. So he handled it differently. He said "What I can promise you is that when it comes time for your review," and he told me when the review was, he said "If you're exactly what I'm looking for and you make great progress and things work out perfectly, you're gonna get the salary you want, if not, more." And he came through for his promise.

Sherrie: So I took their bait because it was exactly what I was looking for job-wise. The salary, I just dealt with it. It was only a year. But then I took that week and then when the review came, he was happy, and I was happier because I'm not only making more money than I made when I started, but I'm having my idea job. So because he told me that in the interview process, I knew I had something to work towards. So just let your candidates know and you go through it in the interview process. You don't have to tell everyone all up front. It's when you finalize the interview process. When you get to that final stage, you tell them then "Look. I like you, but I'm only ready for part-time. Would you be available full-time if I gave you enough notice down the road?" And if they say yes or no, then you can decide upon it at that point.

David Phelps: Okay. Okay. Alright, let's do this at this point. So, Sherri's given everybody a very high level topical view on the benefits of bringing on an executive assistant, especially a rockstar as she's described it. The way to go through anything to take next steps with anything, you need a system. You need a process. You need a blueprint laid out in front of you, right? So that's what Sherri's created. I grabbed her products as soon as it was done just a couple of years ago, and so that's why I want to bring it to you because if you're committed to wanting to really take

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the next steps in any aspect of your life or business or investments or all things combined, you're really ... I'm telling you. You should really start down this path even if you do baby steps. Don't think you can't do it. You can.

David Phelps: So Sherri's created this great product. It's a three step system to recruit, select, and hire the perfect rockstar assistant. First step is how to create the perfect job profile for your rockstar assistants. Things you absolutely must be in the job profile. The skills that you need to put in the profile. Some of the hoops, the exercise. You know, the filters that you talked about that wheels it down to a chief candidate so you're not going through a hundred resumes which can happen to you very quickly to do this the long way.

David Phelps: Smart objectives you need to have in place before you begin the recruit. The second steps just showing you how to recruit candidates. Quickly pre-screen and interview the qualified one, nail down the choices obviously and some of the winning ad samples that she has used and tested already mark place. The third step in the system is really the most important one. It's called how to make the offer the right way. She just alluded to that just a little bit just a minute ago, how to make the right offer. It makes you also put in three bonus gifts real quickly. The first one is rockstar assistant resource package which includes the rockstar assistant perfect job, profile critique. Rockstar assistant ad critique. Comprehensive background check and hiring MRI and risk performance reviewer.

David Phelps: Number two, the second bonus gift is the audience bonus package containing 2 CD's and the eight key differences in hiring a virtual assistant and ten key factors of having him in a boss's point of view, and a third bonus is putting

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it all together . Includes a gift for your new rockstar assistant. The rockstar assistant Bible designed with their success in mine which you now understand is so key if you want someone with high caliber and longevity with you so their success is important and it will also reinforce an essential approach to personal professional balance. The part of this gift, number three, is for the boss, you. Why being a strong leader makes your rockstar assistant ten times more beneficial to you. It was created to help you keep your rockstar assistant on track and show you how to communicate with everyone. Communication is, I think most of us know, is critical in everything we do whether it's with our assistant or our spouse or our kids. Learning how to be better communicators is the world today.

David Phelps: So I think, Alex, you've already put it up there in the chat. Okay, Jim, you got to run. There's the link right now if you want to grab that. Jim, if you want to take a look at the links there. So questions. I can't unmute all of you at the same time because it'll go nuts in the background, so can you do ... You guys just got to show your faces. In fact, like at least seven of you showed your faces and I'm gonna have special deserts for you at the event next week for showing your faces. The rest of you are on your phones.

David Phelps: Shaun O' Rourke, man, you're always the funny guy. You're not showing up with your hats anymore. I mean, you're really disappointing me. I'm just saying. Those of you on ... Whether you're on your phone or you're just not showing your faces, why don't you type your questions in the chat bar and I'll read them, okay? Or if your on line, raise your hand I'll unmute you. So anybody got some questions? All questions for Sherri you'd like to ask her?

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David Phelps: I was gonna ask you Sherri, while they're thinking about it, you probably have it in your system but let's just put it out there. There's a lot of different personality behavior profiles out there. I think you mentioned a few. I'll mention some. Myers Briggs, DiSC, Colby, StrengthsFinders. Do you recommend using some of those, both for yourself, the boss in this case and also the executive assistant to kind of see what behaviors look like. Does that help?

Sherrie: It does help and that's actually part of what the long interview process still did with me. I would say, depending on how many candidates you get and how much you like that person, I wouldn't necessarily do that up front. It kind of walks you through the product of how you do the interview process. You don't even have to be the one that interviews them up front. You can have someone that you really rely on in your office do the initial interview up front and then if they're like "Well I really like this person," then you can schedule another interview with that person to come back and see you. And before they come back to see you, have them do that profile test. So that personality test. So yeah, I do recommend it. I think it reveals to you some things that people necessarily wouldn't reveal to you in person and the other thing too that it will provide for you is an opportunity to ask particular questions in regards to their personality in the interview that you're gonna do with them.

Sherrie: So again, that's why it's important that you don't do it right away. You wanna do it ... Once you know if they're a good enough candidate, you do it before you interview them so the interview questions you ask them is part of that test, because if you wait until afterwards and you spend all of that time with them and you discover "Wait a minute. There's something kind of weird on this personality test

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that came back" and a simple question to them at the point and time of interview will use that. So yeah, to answer your question, yes.

Sherrie: Another quick thing I'd like to point out was ... And you can probably confirm this too, David, since you have the product. The way the outline of the product is and the steps and processes that it is, you don't have to use it one time for your executive assistant. You can use it again and again and again. You just change the job profile to whatever particular job you need to build for your company.

David Phelps: And this is exactly how I found Lindsey. Two plus years ago when that's when I knew I needed to do, I used your product and used the ads, the filters, and obviously it worked great because I have a great rockstar executive assistant so proven process. Sherri, got a question from John.

David Phelps: John says ... He says "Sherri, how could I best determine the best compensation structure for my potential rockstar assistant? Is it based on my local area going rates" for his local area, which happens to be in Southern California. Yeah, how would one go about determining what's the right structure? Can you give us some quick guidelines on what that research would look like to do that?

Sherrie: Yeah. So again, going back to the pros and cons of a virtual assistant versus an in person assistant. Virtual assistant, it doesn't matter what part of the country that they're in. It just depends on what you want to pay them. Most virtual assistants back in the day were honestly more money per hour than an in person assistant would be because you're paying for someone that is part of the



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system. They're not really technically an employee and they were usually somewhere around \$75 an hour for a virtual assistant. That was a number of years ago. I don't know if it's changed or if it's about the same, but if you did a basic Google ... The different websites have changed. I think I've got websites in my product now but there's those plus new ones now, where you can look up on Google what the average rate is for the executive assistant.

Sherrie: Now, there's different levels. The old days, they would call a secretary, then it would be an administrative assistant and then executive assistant and then from there, the office manager. So there's different levels. So we determine on the actual level of the employee. So you would do some research and then you would determine based on the skillset. We usually break it down by a skillset you let them be responsible for and decide upon that. Look at your budget internally. What are you comfortable maintaining? And it kind of goes back to being transparent within that front is that you can say to the "Look. This is what I'm comfortable offering you at this time and after the renew process, we can discuss and increase or discuss a bonus." Things like that. So you can do it on an hourly basis. You can do it on a salary basis. You can do it with a combination of salary and bonus but the salary's a little less and depending on how well they do in certain parts of what they do for you, there could be a bonus at the end of the year.

Sherrie: So first you just need to check your area and see what the going rate is for that particular level because they will change because the cost of living's different in all parts of the country.

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David Phelps: Yeah, great question then. Excellently answered. I see Dr. Kat Gwinn is a fast action taker. She actually has her new assistant right there with her right now on the call taking notes as we speak. Smart, smart. I love that. I love that. Shaun O' Rourke, thanks for coming on showing us your ... Yes, sir. Thank you. I feel much better. Yeah. Perfect. Perfect. Alright. Eric Shelly's got to leave for a board call. Thanks, Eric, for being on tonight with us obviously as well.

David Phelps: Alright, we're close to the top of the hour. This has been a really really great call. Any last quick questions for Sherri? Anybody else that'd like to tap her brain and her experience right now, otherwise I promise you everything you need to know is in that product. So.

David Phelps: Oh, by the way, Sherri, something I didn't mention, but again, just for our group. You talked to me about doing a call some weeks down the road for those who invest in the product, start going through it and maybe start taking the process, you know. Now they got a few additional questions for you during a group call which we'll schedule a little bit later next month based on schedule so that's something else. Maybe I shouldn't read it, but something you and I talked about and confirmed. So I think that's was all. So you got Sherri for another call, for those of you who are committed and ready to go down this path and make this start to happen in your lives.

Sherrie: Exactly, because I think that would be very helpful for people because if they get this, it's an actual physical product. Its nothing digital so its a lot of materials to go through and I don't say that to overwhelm you. I say it because it's needed. This particular position, any position of importance in your company needs to go through all of

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that and I see you do have a question here. Do you want me to answer that one?

David Phelps: Yeah, go ahead. You bet. Mm-hmm (affirmative).

Sherrie: Okay. So the question was "How do you deal with access to financial accounts?" So that, honestly ... In an executive assistant position, that isn't something that's instantly part of what that skillset is normally. Oh, there's your funny hat guy. So that's usually handled by an accountant in the office or a bookkeeper or something like that but if you want your assistant to have access to financial accounts, make sure that that is part of your job profile so that when you're getting resumes back from them, you have that qualification and that skillset within those resumes. Otherwise, if it's important to you and you got through that interview process and then you say to them "I'm gonna need your help with this" and they have no skillset, then you're gonna be disappointed. And then it's a disappointment from you to them, and then they're going to be disappointed because they wish they would've know.

Sherrie: Now, depending on the level of that financial thing ... Back in the day, we didn't have as much as we did now. And now we've got really easy systems in place and great tutorials online that we can learn how to do it properly. So if you've got that and that person can't have access to it and yeah. But the big think you want to do is have them sign documentation stating that they realize that they are responsible for personal information and you have them legally bound to admitting that they are seeing your personal financial information. So if anything down the road happens, you've got that legal documentation. So it's kind of one of those things where you don't want to hire

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someone who's gonna be in control of something very important but it's just on a handshake. Right? Because if something happens, then all of a sudden your money becomes missing and it was on a handshake, you might have a lot more problems ... You know. I'm no attorney whatsoever but I would think you would want to still it to be in contractual writing saying yes I understand my condition.

David Phelps: Yeah and realize that there's different levels of access you can give and what I found, passing on to the rest of you, is that kind of information is something that if you decide to let that executive assistant have access to, maybe it's something you do in steps. Maybe it's something that you do over time and you know, there's certain levels of access. There's deal only and then there's transact and even in transactional aspects of level of access, Lindsey, for me, can set up online payments but I have to go approve them. I have final say. So she can do a lot of work for me in advance but I have to hit the send button or have Candace do it or somebody else. So, Lindsey doing a lot of the base level work for me in that regard so I would say what Sherri said. Also the background check, if you're gonna go. It's important, period.

David Phelps: John Harris, I don't know if you were there at one of the meetings but I can't remember what one of the guys talked about a horror story he had and I just want to say they are. There's a horror story in everything in your life. Now, it's not gonna be a horror story if you follow the right steps, but it's not to scare you all, but he hired someone who he didn't do any background check, he hired on a ... You know, just bang, because he needed somebody which was the worst way to hire and this person was a

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pro, not a pro executive assistant, a pro ... Embezzler wasn't the right word. It's pro was gonna get inside this guy's business and extort money and she did. And she did. But he found out later she had a whole background. Had he just done background check, he would've found out. Didn't do it.

Sherrie: Exactly.

David Phelps: Didn't do it.

Sherrie: Yep.

David Phelps: So protect yourself. Yes. You have to do that whether that's an executive assistant or your own business apprentice. You should be doing that because you don't know who you're letting in there door. Right? In practice, you've got HIPAA laws and all kinds of financial data and you know, it's on us. The bonus is on us as the owners to protect that stuff. So we got to do it in our regards, everything we do. It's just there.

Sherrie: Yep. Exactly.

David Phelps: Right. Great question. Great question.

David Phelps: Alright, well listen. I think we had a great call so I hope a bunch of you will take this next step because I promise you, it's one of the things that's holding you back if you're in your transformative live. I'm just telling you. That's just the way it is. If you want to keep pillar, I know for a fact in my life in moving the needle. Everything else is tactics and strategies with no leverage because it's all on you and you can't run your life that way. This will make so much sense and once you get involved it, you wife, your spouse will love ya because you have more time. You got

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someone doing a lot of stuff that you were trying to do. Your staff will love ya because you're not gonna be as grouchy at work, so you'll love yourself better. Your kids will like you better. You'll be a better person for it and you'll be able to get into having more think time to yourself, which I'm gonna tell ya, that's the most powerful leverage you've got is your think time. But most of us and most of you, even where you are right now in life, which is very high on success totem pole, you don't have enough think time. Why? Because you're still trying to do everything yourself. I know. I've been there. I've been there. So, end of my speech. Just gotta trust me on this one.

David Phelps: Alright. Well, Sherrie, that was really a fun call to do with you. Knowing you and knowing what you've done to help me personally with my own executive assistant and my own business and how you are helping and have helped so many others. I'm just excited to get this product of yours in the hands of so many other assistants just like me who are trying to do so many things in our life and multitask in different ways that ... But by using your strategies and your process in this rockstar executive assistant product that you sympathize. It's gonna just do amazing things so I want to thank you so much Sherri for being on today, giving your time but also just for creating what really is an incredible product.

Sherrie: Well thank you for the time, David. I had a lot of fun and I look forward to helping out way more people just like you.

David Phelps: Very good, Sherri. Alright. I hope to see you. I know we will very very soon. Take care.

Sherrie: Yes. Thanks, David. Take care. Bye bye.

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