

**Get Your Time Back - Building an Effective Team and
Improving Efficiency - Bob Lachance: Ep #485**



Full Episode Transcript

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Dr. David Phelps

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Welcome to the Dentist Freedom Blueprint, a podcast about freedom—freedom from expectations of society and the traditional path to success that has been ingrained in us from our early years, I'm joined by mavericks, renegades, and non-conformers to discuss an anti-traditional path to financial freedom, freedom of time, relationships, health, and ultimately freedom of purpose. My name is Dr. David Phelps. Let's get started.

David Phelps: Good day, everyone. Dr. David Phelps here from the Freedom Founders Mastermind and the Dentist's Freedom Blueprint Podcast. Today, this is going to be a very informative and I think a very applicable conversation with a gentleman that I've known for a number of years with bus streams and other masterminds.

And Mr. Bob Lachance who's here with us today is going to really sow some great tactics and strategies for every one of you at some level or the other on how to better leverage your time through the skills and time of other people. And that's really through the whole arena of virtual executive assistance. And that's exactly what Bob has been doing with his company, REVA Global for the last, how many years, Bob, have you had?

Bob Lachance: Back in 2014, so I've been doing this for about 10 years, 10 years now.

David Phelps: So Bob, first of all, thanks for coming on and giving some of your time and your insights today.

Bob Lachance: Thank you for having me. I appreciate it.

David Phelps: So you're, you come from entrepreneurial roots. Also, you came up through playing hockey. We're talking to a lot of dentists today. I just got to ask you, are you missing any teeth?

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Bob Lachance: I see you have a full column. I mean, you could tell, look at that one right there.

David Phelps: Oh there. All right. Okay. So you understand dentists at least from the patient standpoint, I guess, right? But you also understand dentists and medical professionals even though you do a lot in the real estate arena, which is also something that you came up through and built your own company with a major number of transactions.

But tell us a little bit why and how REVA came about. Was it initially your need or did you see the needs of others or was a combination thereof?

Bob Lachance: Yeah, I had a real estate education program that we helped start with a bunch of partners back in 2007, and I was always looking for a way to help them perform tasks.

We had a lot of dentists, we had a lot of physicians, doctors that came into our real estate education program that wanted to invest in real estate. And one of the things that I found is many of all of us, you included, were very, very busy. And they didn't have the opportunity or the time to be able to implement the action items or the things that are required to be successful in real estate.

So ever since 2007, I was always looking for a service or a product to help them perform those tasks. And then fast forward to 2013, I got introduced to what a virtual assistant was. All of a sudden, that happened. The light bulb went on. I'm like, "You know what? Let me marry the training program that I actually created and helped create now with FortuneBuilders, which is the company that I was working with the virtual assistant world." And then in 2014 I launched it to see if it actually worked and then lo and behold, 10 years later.

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David Phelps: So where do you find the virtual assistants and what is their relationship? Are they contractors with REVA and are they around the country, around the world? I mean, what's the relationship there?

'Cause obviously you've built a mechanism, a team where you do a lot of vetting on the front end and you're a connector and helping find the right VA for the right person or company. But what's underneath all that? And how do you, no one's gonna go out and try to duplicate what you've done, I promise you. So don't give your secret sauce here, but betting good people is the thing we all struggle with, right? So you must have something you could give us to help us overall with how we get over, you know, how do we find people in general?

Bob Lachance: Absolutely. All my virtual assistants are in the Philippines. So I started that company. So I'm back and forth there about three to four times a year. We have a fantastic management structure behind the scenes all the way from executives to, we call them client service managers that manage a team of probably about 20 virtual assistants and many of the offices have over 10 plus virtual assistants.

So, you may have one client service manager that manages one office, let's just say as an example, but how we find them is we're consistently marketing. We have a whole team of recruiting and sourcing specialists over in the Philippines that go through thousands and thousands of applications per month. And just to give you a little background of it, we have a very stringent recruitment process that only 11% actually pass through as applicants and about 40% get through the training process and only 5% get endorsed to clients.

So we have a very high vetting process. Same thing, same here. If you look at the United States, it's very difficult to find very good people. So we have to go through the same thing. We have to go through a number of applicants to find the best for each of our clients.

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David Phelps: Well, tying that back to something that a lot of people that we work with and people we help on the real estate side, I think we find the same thing when I talk about people that are kind of accidental landlords.

Well, I'll buy a few rental properties, I'll fire up an Airbnb and that's all that's fine and good. And then you realize that if you don't have the processes set in place to market for potential tenants and then have a vetting process, you're just rolling the dice, and that's where people get beat up.

Well, we get beat up the same way when we're trying to fill spots in our businesses, whether it's VA or in person. And we just like, "Well, I just got to fill out spots. So I'll just take the first person who shows up and gives me a smile." Right? And it looks like they're halfway cognitive. And it's like well, how many times does that not work?

So when you're running a company where the companies that engage with you were looking for a reliability, a capability for sure. But reliability is the big one and we've got this, had this great resignation coming out of COVID, right? Where nobody wants to work anymore. So tell us a little bit about the Philippines culture because there's a reason why you find good people in the Philippines. So what is that?

Bob Lachance: You know what, it's just a different type of culture. What we do is we have, we're very, very fortunate. I think the Philippine culture is a very service-oriented culture. So there's a lot of call centers over there, very, very reliable, family-oriented.

They look at your business. I mean, you use one of our virtual assistants as well. You look at, they look at your business as their business. It's very, very different than around here. And I'm not, I'm not saying negative, anything negative around here, but you know, in my real estate investment company, it's very difficult to find those dedicated people.

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I just hired someone. This is just a perfect example. I just brought someone on here in the United States and they missed two weeks out of a month. So I had to get rid of them. It's, I don't understand it. I really don't, but the Philippines, that doesn't happen. So it's just a very different culture. And it's just, maybe it's just the way, I don't know what happened in COVID, but COVID's kind of separated it for here in America. It's very difficult to find people that actually want to show up to work. I don't understand it, but maybe you have a better take on that side of it than I do.

David Phelps: Well, I think the Philippines didn't get the helicopter money that our government and then spit out to everybody just to stay at home and watch Netflix. I don't think they got that.

Bob Lachance: They did not.

David Phelps: Right. So they actually understand you have to actually go to work and be productive, to quote, earn a living. And I think here in America, we've flipped that. So it's like if you don't want to do anything, don't, just sit at home. Anyway, we don't have to go in that rabbit hole. So what in the Philippines then, do your virtual assistants, do they go to an actual brick and mortar or do they work from home or is it combination, or how do they set up?

Bob Lachance: So our structures' all work from home. So we actually do a very, very big vetting process. So we have like we were talking about before this, we have a real estate virtual assistants and executive virtual assistants, like we talked about, and we also have medical virtual assistants.

So we have two different teams that actually recruit, right? So obviously the medical side is different because you're looking for a different individual. What we're looking for on that side is someone with a medical, a four-year degree, someone has healthcare-related obviously degree on that side of it.

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We put them through HIPAA certification. They have one to two years experience in the medical related field and on the real estate side, it's just a little different. Right. It's just a little different qualifications where we still require them to have a four-year college degree, but they don't need as much experience, obviously, than the medical. Medical field is a lot different as you and I both know.

David Phelps: Yeah, that's really good. And as you mentioned, I'm just going to give a plug for the VA that you set us up with many years ago. We've been running six, seven years now. I'll just give his first name for anonymity, but Randy, you go back and Randy, really, she works directly with my executive assistant, Lindsay.

So I don't really engage with Randy. I try to send him a message once in a while, just tell him what a great job he does. But yeah, behind the scenes, his capabilities of really helping Lindsay, it's been terrific. And what a great way again to get to leverage your other human capital with a workforce potentially that could do a lot of the tasks that don't need to be done right there on-site with your office or back to—I don't have anybody working with me in my office. Everybody I've worked with is virtual today. So I love it. I get it. It gives me a lot of flexibility, but the downside, and I think you just brought up with the vetting you do is if you're going to work with your own teams or VAs that you're not there in the office with you, then how do you have the accountability and how do you know they're getting stuff done, that's what people worry about while I'm paying somebody.

But how do I know they're actually working or is it per hour? I know people are paid per hour, but we're more interested in outcome, right? Outcomes, like what's the outcome? Are we getting this stuff done? Are we getting this amount of work done? Or what's the outcome? How do you kind of deal with that with I'm your client, but then you also have people that need to get paid for a certain amount of time they put in. They're not getting paid so much on outcome. They're getting paid on hours, but I want outcomes. So how do you kind of put the two together?

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Bob Lachance: Well, I could just, I'll just give you just an example. So dentist's office, physician's office, et cetera, we have the main things that they do are front desk management where they take inbound calls, right? They take patient intake and registration, insurance verification, prior authorizations, all those are trackable, obviously within whatever system that you're using. So that's just one of the answers. on the executive assistant side, so this is where we see the most, obviously with you and dentist offices, obviously this is what we're talking about here. So those are the tasks on that side and the task of executive assistant side, I know you and I were talking a little bit about this before, but some of those tasks are handling calendar events, organizing reports, documents, answering phones, setting up travel is a big one.

So those are all tracked in real-time. Obviously, if you need something, you're working hand in hand with their executive assistant. We also have different types of things where we have start-of-day reports, midday reports, and end-of-day reports. We also have a client service manager that manages the relationship between you and your virtual assistant.

So if you need anything at all or you have any questions, you have another line of defense to reach out to to ask questions if you're looking for another virtual assistant or whatever questions that you want, maybe it's new training that you happen to create in your practice or another task that you want to be done.

David Phelps: So if somebody is thinking about, gosh, it sounds good, but everybody always needs help with how do I get this started? I know 'cause that's where I was years ago. I was like where do I start? And so I assume you've, I know you've got a process for engaging a client who says, "Yeah, I need some help, but I don't know where to start."

So you take them through some kind of interview process, and figure out, "Well, here's where you might need one person. You might eventually need

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a secondary person,” but is that what the client manager does or how's that process work?

Bob Lachance: Yeah. So right at the beginning, our client service manager sits with you, let's say for your dental practice and one of the biggest needs are one of your admin, one of your nurses, one of your individuals that works underneath your umbrella, they're kind of spotty in, in showing up at work as an example, or they're taken away because they have too many admin tasks. So when you start looking at that, you start looking at what admin tasks that they do.

So this is what I always, when I walk through the process, I say, “Okay. Write down all of the admin tasks.” I think when you and I went through this back seven years ago, write down all of the tasks that, let's say Lindsay is doing, as an example for you, that she needs help with. So that's what she did.

She started writing all those down and then we sat down and said, “Okay, your virtual assistant could do A, B, C, and D. Let's pull those off your plate or Lindsay's plate so she can now focus on other things of getting done in your office.” So that's a good starting point. And then we kind of peel back the onion for each of them.

David Phelps: I know when somebody pulls that information out of me where I'm, it's just foggy for me, but someone who's really good, well, it's look, it's just like a doc. So our doctors understand that when they go in and see a patient comes in with needs, wants pain, complaints, cheap complaint.

Our job, we're trained to do what you guys do on a VA side is like, “Well, let's diagnose.” So the doctor does tests. They talk to the patient, same thing. That's what you do. that's what you do. So I want to give them kind of something, an analogy to go with. Now we're the patient. We don't know, we don't know, but we just know we need some help, right?

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And so you guys, yeah, so really that's what you guys need to do to help us. Talk about whether it's just anecdotal or like some case studies, but I know people like to hear like some of the people you've worked with, particularly dental medical field, in terms of what's been like, the leverage, the inflection point, the growth spurt, what do they report back?

I'm sure there's different metrics like, well, how much time they got back? Well, that's huge. They, I mean, you just got time back in your life. That's a big ROI, but other growth aspects in the practice or models, what have you kind of seen as some points of reference?

Bob Lachance: Yeah. There's two points of reference that we actually see, and this is the feedback that we get.

And this is something I actually wrote down. It's reducing costs and driving revenue is one of them. So those are the outcomes, right? We have a practice that we actually saved about \$8,000 from overall denied claims as an example, right? And that was with one carrier. So that's a huge amount of money, it was \$8,000 a month as an example.

So that's just one of the examples that I just got an email in today. The other one is reducing expenses. So 'cause you look at it, you have someone in your practice that is let's say you're hiring them for our \$30 to \$36 an hour, right? As an example, you could outsource insurance verifications, prior authorizations to a virtual assistant for \$12 an hour.

And the outcome obviously is going to be the same or better because that's just what they're dedicated on and focused on. Those are the two things that we see that's huge for every dentist practice that we work with today.

David Phelps: Here's one that just kind of comes to mind, but I hear it a lot and I've been a huge fan of becoming much more knowledgeable myself and capable in all things marketing because marketing is a huge part of any business.

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And a lot of times for medical and dental, people that are highly trained in socialized work, business and marketing, it's just like this thing out here that I don't worry about it, it'll take care of itself, but we know today, if it was even true decades ago, it is not true that we have to understand business, we have to understand marketing, but we can't do it all.

So I know a lot of doctors and dentists office are much more in tune with, "Yeah, we need to market, social media, Facebook, Instagram, maybe a newsletter, direct mail," what, you know, blah, blah, blah, blah. So they're more in tune, they're studying that stuff. And many times I see, which I'm sure you see it too.

It's "Well, I'm just going to put that on, Sally, the dental assistant, 'cause she can do that in her spare time," and back to what you just said, it doesn't work because they need to focus on one thing and do that one thing well, and if you've got her on a stretcher team, well, whenever they get a spare time, number one, the spare time is not going to be focused on what you want to get done.

So now you get frustrated because like Sally, who said, "I love to do marketing." But she never has time, focus, she doesn't have the resources to do it. And so you go, "Well, that doesn't work." And you get mad at Sally or Sally gets mad at you. And it's like okay, blows up. But what about the marketing piece?

Because obviously, you do a ton of that for your real estate people. I mean, because they've got to have leads. Well, we need leads in dental and medical practices, too. So do you have somebody for the dental medical that could come in and be that marketing force for our practices?

Bob Lachance: Yeah, we do have some practices that actually have, social media slash marketing, virtual assistants, and a lot of it is the branding side.

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And I know many of us, we don't like it because it's just, it's going on social media, it's time-consuming, it's all of that. So what we do a lot of times we recommend that we go through a list of questions and we, just like what we're doing right now, we could take this podcast and cut it up and splice it up into content for a month, right?

Little snippets of it. And just, I mean, the thing is with practices, with any type of industry out there, if you're—out of sight, out of mind, right? If you're in front of everybody. And typical, let's say Instagram as an example and Facebook, those are two that are, that we see are the most, and I know TikTok, but mostly, Instagram right now and Facebook and LinkedIn actually, that is the highest producing revenue, meaning it's a lot of it's tough to track unless you set up funnels.

I mean, you're a very good marketer doc. So that's something that I know you understand a lot of praxis. It's a lot of the branding and marketing is being aware, just having your face out there and being the expert in your area. That's what separates you and the doctors from everybody else, because a lot of people don't do it.

David Phelps: Yeah, I understand. Yeah, because it's just, it's too much friction, too much, so we get exasperated and go, well, I'm just not going to go do it because I don't do it well. It never worked out. Never understood it. So again, it's just, this is a whole world today. And because of the internet, we're able to leverage talents as you do from around the world.

And we expand the opportunity so much back in the day before the internet. Well, you, this was impossible. And today it's just, it's a huge piece that we have to, I think, we have to stay competitive to increase profit in an environment today with higher regulation, higher overall overhead costs. We're trying to squeeze out more and more profit margin from less and less.

And this is a huge part of it. And I do get excited about it because I really try to help the dentists I have privilege to work with, Bob, directly and help them.

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But doing this podcast really gives a chance to anybody who's within our earshot. I don't sell anybody's services so I just want to be clear. So people think I don't have Bob on here and Bob's going to give me some spit back. We don't, I don't do that. We don't do that. I just really truly like to help people. And Bob's been doing this long enough. And I said, I have direct experience with him and his company. So I'm speaking as a user, but if you are not using some form or fashion of a assistant, virtual assistant, you're losing a lot of opportunity and you can just start out in baby steps, right, Bob?

You don't have to bite off that whole enchilada. You're going to start out with baby steps just to get the feel for it. 'Cause I know we're all kind of control freaks and we don't want to give up too much, too fast. And you know how, and personal financial stuff and the practice and HIPAA, you've done this long enough. You know how to do this, but I think we all just need someone who can trust to talk to and go, okay, give me peace about doing this, right.?

Bob Lachance: Absolutely. and, I know we talked about this before, if anyone has any questions that listened to this podcast, he could set up a consultation with my team and they'll walk through everything. And just like you said, diagnose. Just like doctors do, they diagnose what the challenges are, what the potential problems are and then we find solutions for those. So, same exact thing. That was a great analogy by you.

David Phelps: One more thing I'm thinking about that probably comes to people's minds. Okay, Philippines, time zone difference. How does that work out?

Bob Lachance: So they work at night. That's very, very standard for them. So when they're, even when they're younger, a lot of individuals, parents are in the call center world. So a lot of them work at night. I just go, whenever I go over there, I'm like, wow, this nightlife is crazy.

Out from, morning to night though that's never like that. We get that question a lot, but that's very standard.

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David Phelps: Okay. Last question. What's the best way for a doctor and owner who wants to start getting engaged in particularly if they're going to utilize some assistance within their practice, how do they tell the other team and get the other team, the rest of the team members who are there with them in person feeling okay, like not being offensive?

I'm sure that comes up 'cause nobody likes change. Sally and Susie have been there for 10, 15 years. Like they, what's this? They're not going to be initial believers. So how do you broach that potential barrier?

Bob Lachance: And sometimes they feel like they're going to get their job taken away the other things. This is very easy. It's someone that's going to take pressure off your plate. So the conversation is what's worked very, very well through our 10 years of doing this. It's just talking to your staff and explaining to them, "Hey, you are overwhelmed. We want to make your job easier. We want you to have a singular focus on these tasks so we could take the other tasks off your plate." That seems to work very, very well. It's more of, "We're going to help you. So you're more productive in your day-to-day tasks."

David Phelps: Yeah. No, excellent. No, this is so good. I really hope that some people will take advantage of just try it.

If it doesn't work for you, then you don't, you're not gonna lose anything by trying something. But I think, you'll try it, particularly having an agency behind you to help guide you because that's where we all need help. "We don't know, this is our first time doing this. It feels a little scary. What if the first person we engage with doesn't work out?" Well, you have somebody else, right? You'll just, you'll plug and play if that's even necessary. So we don't have to worry about that. That's why having somebody that has done this like you have with REVA for so many years that you've been down this road many times with other people, the best way to connect with you I mean, obviously the company is REVA, R E V A global. com. I will put these links

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in the actual show notes, but for those who are listening or taking notes, Bob, you want your email in there or what you're just—

Bob Lachance: Yeah, you can send me a direct email. Bob@REVAglobal.com. Bob R E V a global. com.

David Phelps: You also have a podcast, which is revaglobal.com forward/podcast. So you do a regular podcast. So people want to learn more and just get into your world a bit more. You're putting good content out on a regular basis as well. So which probably tips and things that people haven't thought about. Well, how can I better, again, leverage VA? So if you want more education about this, I mean, Bob's got all that. Anything else that would be helpful for people?

Bob Lachance: Yeah, I would just say take action. I mean, we look at the world is, it's almost like our, sometimes our profit is shrinking and shrinking with new regulations. So, what we do very, very well is we do help reduce costs and, help drive revenue in different ways.

So definitely look, if anyone has any questions, like I said, send me an email. If you want to get on a call, my team will definitely help diagnose any challenges you may have or just questions. So, we're here for you all the time.

David Phelps: Great. Bob, I appreciate your time so much. Thank you, sir.

Bob Lachance: Awesome, doctor. Thanks.

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