

 mindbody
business

The Complete Guide to Staffing

Introduction

As you start or grow your business, you'll need help to run, manage, and expand it. That's where your staff comes into play. And while hiring and retaining a good team is no simple task, the effort is well worth it. In many ways, your team is the foundation of your business.

This guide details the ins-and-outs of staff management. That includes creating core values, hiring the right people, and managing them well.

Be sure to download the template that fits your business and fill it out as you read along.

A staffing template for:

- [Fitness businesses](#)
- [Salons](#)
- [Spas](#)
- [Integrative health businesses](#)

It starts with the business owner

What's your role? What can you do to best serve your business, and what can you delegate?

It's important to answer these questions so you can spend more time doing what you enjoy and find people whose strengths complement your own.

As you make hires, think about how you want to lead them. Some of the most successful entrepreneurs follow a conscious leadership style. This requires that you:

- **Know yourself**, including what you're good at and where you can grow
- **Get yourself out of the way** and learn to ask for help when you need it
- **Understand your role**, including what it includes and doesn't
- **Stay aware of...and curious** about both your customers and your team so you're always improving
- **Love people** and find joy in helping others grow



Make a business case for your team

The first step in hiring staff is to make a business case for the expenses. You must measure the benefits and costs. Here's how:

First, consider the costs of having employees, which likely includes:

- Wages
- Payroll and unemployment taxes
- Worker's compensation insurance
- Employee benefits

Next, consider the benefits and additional revenue you'll earn when hiring help.

If this covers the employee's cost, provides a better customer experience, and lets you focus your efforts elsewhere, it's a worthwhile expense.

As a business owner, your time is especially valuable. Calculate your own "hourly rate" and use it to decide if it's worth outsourcing tasks to a staff member. You'll probably find handing off back-office or facility tasks to someone on your team frees you up to focus on more strategic, income-generating activities.

How to calculate the benefits of hiring additional staff:

In the example below, a fitness business calculates the positive impact of hiring two additional, part-time employees with clear goals for converting drop-ins into introductory offer sales.

Goal: Increase intro offers sold from 50% to 80% with 2 additional, dedicated sales hires.

100 new visitors if purchasing drop-in class

100 visitors x \$25 per drop-in = \$2,500 in revenue

100 new visitors if purchasing intro offer

*(\$100 intro offer for a month of unlimited classes)
50% of new visitors convert into intro offer sales -
50 visitors x \$100 intro offer = \$5,000*

[With the addition of 2 dedicated staff-members]

*80% of new visitors convert into intro offer sales -
80 visitors x \$100 intro offer = \$8,000 (\$3,000 increase)*

Find ways to streamline

When evaluating your staffing needs, you may find there are tasks that make you and your team less efficient—or that can be taken off your to-do list altogether. Rather than increasing your payroll costs, think of ways to streamline.

Take your front desk, for example. Is your team splitting time between in-person interactions and answering incoming calls? If so, an AI front desk like [Messenger^{\[ai\]}](#) can help.

Messenger^[ai] manages communication and provides 24/7 customer service. Miss a call? Your AI immediately texts customers back with answers to frequently asked questions and the ability to book classes and appointments. Have a first-time client? Your AI automatically follows up with every new customer after a class or service.

Technology isn't meant to replace your team, but it can help ease the load of day-to-day tasks. Free up your team so they can focus on what's most important—elevating the in-person customer experience.



Maggie

 Phone Call

Hi there, sorry we missed your call. How can we help you?

[ai]

Hi! Can I book a hot yoga class with Adrian tomorrow?

Sure! Looks like Adrian is teaching at 4pm Tuesday November 13. Does that work?

Yep, that's perfect.

Great! You're out of sessions. Would you like to buy another 5 class pack?

That sounds great actually!



Develop your core values and hire to them

Determining a set of core values will unite your staff, improve your hiring decisions, and enable you to work as a team to achieve your goals.

Start by thinking about what qualities you value most. After making that list, narrow it down to the five or so most meaningful values. Then, define, specifically, what each means to you and your business.

Write them down, share them with your staff, and evaluate new hires based on them.

Some common values in the fitness, wellness, and beauty space:

- Community-driven
- Respectful
- Proactive
- Humble
- Helpful
- Empathetic
- Consciously evolving
- Service-oriented
- Creative
- Innovative
- Fun
- Energetic



Recruiting high-performing staff

Recruiting the *right* people for the *right* roles is often challenging. The best candidates often already have jobs. And, the recruiting process can take longer than you think.

Don't be discouraged, though. **With a detailed, defined, and documented process in place, you'll be on the right track for smooth interviews and hires.**



This guide and its accompanying templates ([don't forget to download a copy](#)) outline everything you need to recruit great candidates who fit your core values, including:

Job descriptions/postings: Each position you post should have a clearly defined description and goals. Outline your core values here as well.

Job application: Have applicants fill out a form with basic contact information (name, phone number, email address) as well as questions like:

- How many hours per week can you work?
- What's your schedule availability?
- What's your salary goal? (e.g., primary income, secondary income, etc.)

Pro tip: Ditch paper applications and use free online forms like [Typeform](#), [Google Forms](#), or [SurveyMonkey](#).

Interview process: Whether you opt for phone interviews, one-on-one interviews, group interviews, auditions, or a combination of all four, vetting your candidates carefully is essential to finding the right employees.

Depending on the role you're hiring for, plan your interview process accordingly. For example:

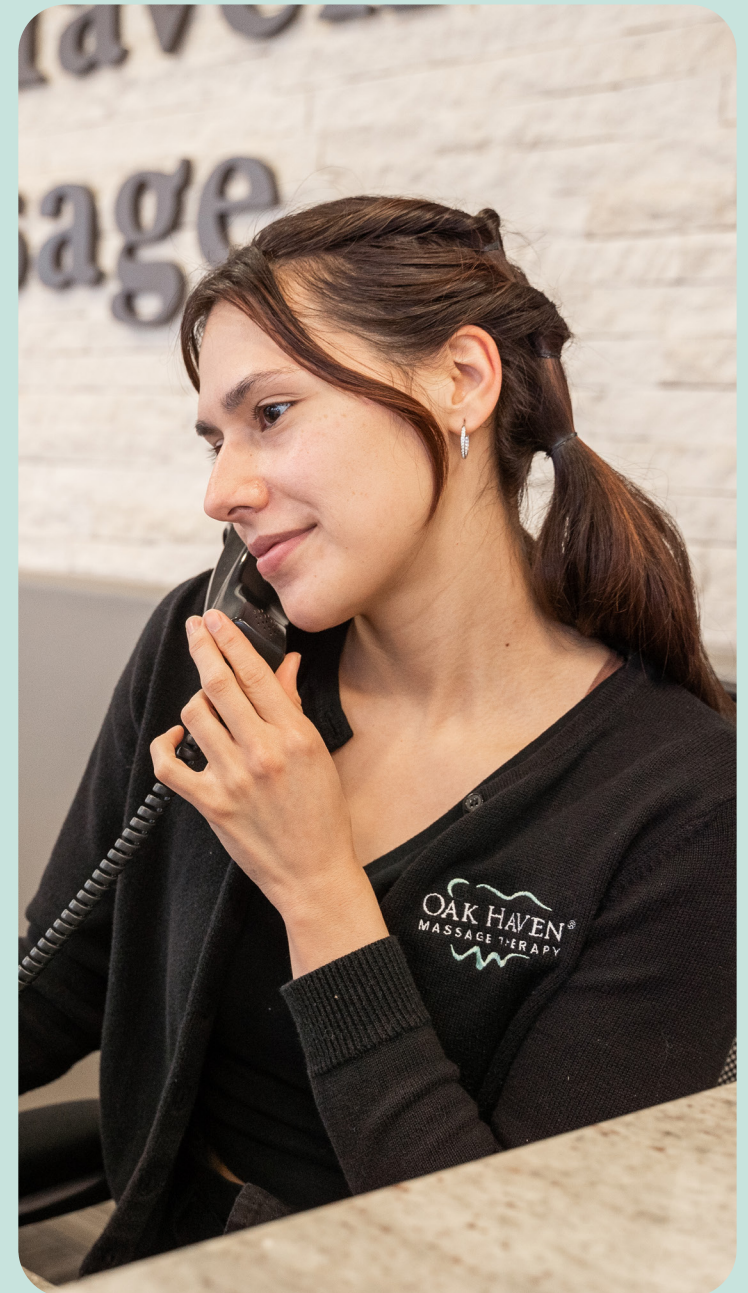
Hiring front desk staff? Have them schedule their first interview by booking an appointment through your business software. If they're not comfortable doing so, they may not be a good fit for your front desk.

Hiring instructors/stylists/practitioners? Make sure they've visited your business. It's important that anyone working at your business has first-hand experience before they're considered. Once they have, scheduling a phone or in-person interview is a good next step.

After scheduling the interview, preparation is key. Create a standard set of questions for each type of employee you're hiring. These questions should help you:

- Get to know the candidate's personality
- Learn more about their experience
- See if they align with your core values
- Make sure they're a good fit for the role

References: After a successful interview, request and follow-up





with the candidate's references. Prioritise professional references to confirm their work habits, customer service skills, and experience.

Offer letter: Your candidate fits perfectly. Now it's time to make a written offer of employment.

Create an offer letter template ahead of time that you can easily update and make specific to the position. Regardless of the role, you'll want to include the:

- Job title and description
- Compensation and benefits
- Acknowledgement of terms and policies (include specifics in your employee handbook, which we'll discuss later)
- Probation period

When making an offer, provide a specific timeline in which to accept—one week should be more than enough time for most candidates to decide.

Training new employees

Perhaps the most important step of onboarding a new member of your team is the training process.

You need to train every single new hire and provide detailed expectations and responsibilities. When onboarding new employees, be sure to:

- **Have a training process in place.** Build a training checklist outlining all of the steps necessary to get your new staff-member up to speed as efficiently as possible. These include steps like reviewing the employee's job description/responsibilities and other important policies, a tour of your facility, and creating a software login.
- **Create an operations manual.** Your operations manual is a living, breathing document that should clearly outline the processes employees need to know, including:
 - Owner/employee contact information
 - Opening and closing procedures
 - Customer service expectations
 - Procedures to handle customer complaints/issues
 - Software how-tos
 - Sales process(es)
 - Safety policies
 - Emergency procedures

Print and keep a copy of your operations manual at your front desk and send an updated copy to each employee upon hire and whenever changes are made.





- **Develop an employee handbook.** In addition to an operations manual detailing your business's day-to-day processes, your employee handbook outlines policies specific to your:
 - Hours of operation
 - Substitution management
 - Communication policies
 - Benefits
 - Payroll schedule
 - Sales expectations, including rewards and/or consequences
 - Promotion policy
 - Mobile phone use policy
 - Dress code
 - Social media policy
 - Break policy
 - Paid time off/sick days

Tip: Make sure each employee has thoroughly read your employee handbook with a signature of acknowledgement in their offer letter.

- **Be specific.** Specificity in your training process and documentation ensures your entire staff remains on the same page and aligns with your core values, no matter what. When in doubt, err on the side of being more specific rather than less.

Managing your team

Your team is a huge part of your business's success, which makes supporting them all the more important.

Although there's not one universally perfect management style, there are a few practices that will help make your employees more engaged and effective in their roles.

Empower your team. Make sure your staff knows how much you trust, and value, their opinions and abilities. Using your operations manual as a guide, give them the autonomy to make quick decisions. For example, some businesses allot a discretionary amount of budget to spend in the rare case of a disgruntled customer or issue that arises.

Communicate clearly and often. Regardless of how you communicate: in-person, email, phone calls, or text, make a point to touch base regularly so you can be sure you're on the same page, addressing any issues or concerns, and working to achieve their goals within your business.

Focus on goals. Speaking of goals, you'll want to create specific goals and growth plans for each individual team member. A formalised development plan will provide a road map to achieving success, long-term.

Reward for a job well done. Acknowledging hard work is key to keeping your staff fulfilled and on top of their game.

Do so with small treats (i.e., free merchandise/products), bonuses, and raises to commend your team, individually, for achieving their goals. That being said, don't underestimate the power of a simple "thank you" or "you're doing an amazing job". [Here's how to use the 5 Languages of Appreciation in the Workplace to improve staff satisfaction and retention.](#)

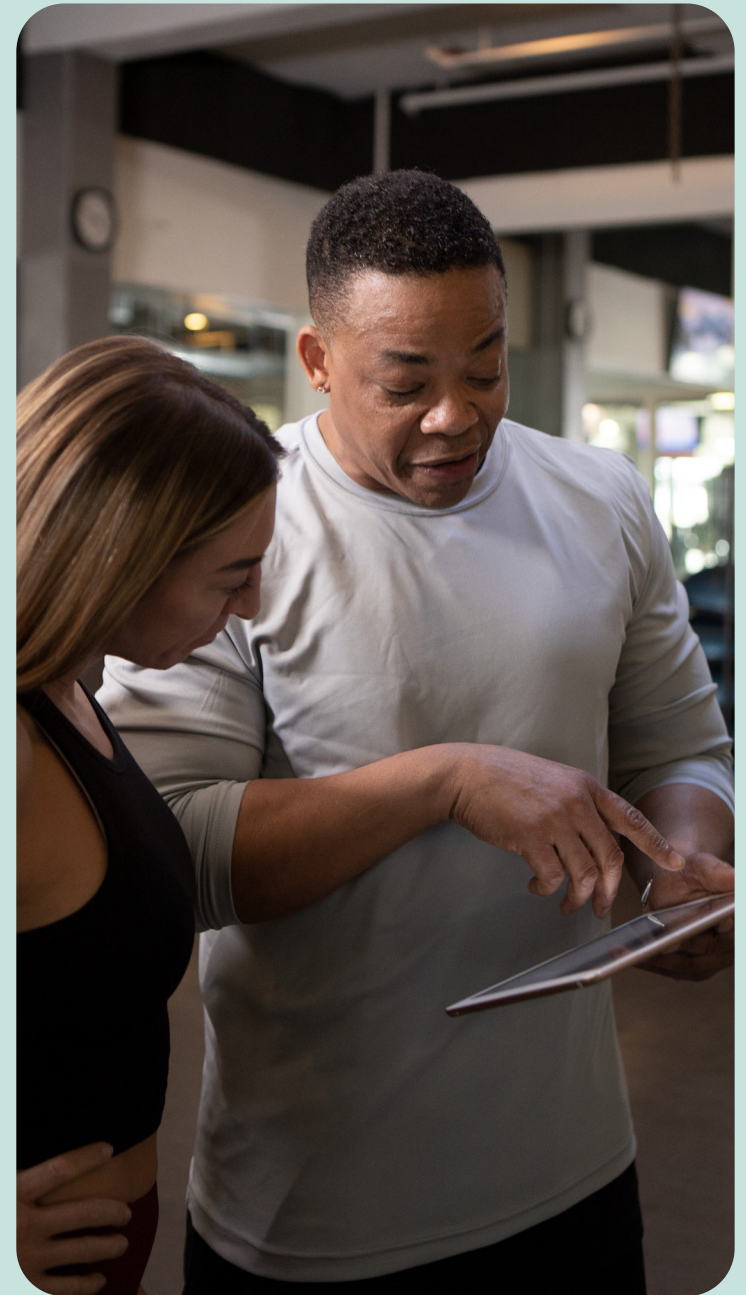
Work as a team. Encourage your staff to work together to not only make their work environment more fun but also to make your business more successful.

Encourage creativity and collaboration during team meetings, plan team dinners and team-building activities, and develop team goals that reward your whole staff for their collective efforts with increasing memberships, product sales, etc.

Evaluating your staff

Keeping tabs on employee performance will help you pinpoint opportunities for both improvement and recognition. Be proactive with staff performance by pulling monthly reports that measure things like sales, attendance, and reviews.

Most importantly, schedule regular staff evaluations. These one-on-one meetings should include bigger picture conversations. As a reminder, these shouldn't be the only time you're checking in with your employees individually. Schedule staff evaluations either quarterly or semi-annually to review performance and set new goals.



Parting ways

Ideally, you'll find and retain high-performing staff members who stay for an extended period of time. But inevitably, you'll either have to let someone go or rehire when an employee moves on from your business. When this happens, it's your chance to learn and make improvements for the future.

To transition as seamlessly as possible, once again, outline specific steps and create documentation to support your process.

Create a termination checklist. There's a lot that needs to happen when an employee leaves your business. Make it easy to remember with a detailed checklist. For example:

- Confirm last day
- Post job
- Schedule last paycheck deposit
- Remove staff access and logins
- Retrieve key(s) and update alarm codes
- Exit interview
- Confirm training new hire, if applicable

Conduct an exit interview. There are no right or wrong answers to exit interview questions. Although it may be difficult to hear, consider your exit interview process an opportunity to get feedback on your business, your management skills, and your team. Ask questions like:

- Why are you leaving your job?
- What did you like best about your job?
- What did you like least about your job?
- Do you have any recommendations for us in the future?



Conclusion

Although there's a lot of preparation and work that goes into staffing and managing a team, it's well worth the effort. With the right people by your side, you'll be able to create better experiences for your customers, make a bigger impact with your business, and develop a better work-life balance for you.



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Roxy's mission is to help wellness businesses thrive in a world that so needs them. Roxy works with yoga, fitness, and wellness businesses via one-on-one consulting, webinars, public speaking, and teaching engagements through Liberate Your Biz Consulting. Roxy has worked with Mindbody customers since 2005 and helped create Mindbody University (MBU) and the [Mindbody-certified Business Consultant](#) Program to help businesses become more viable and profitable.

A regular speaker at Mindbody conferences, industry tradeshows and MBU events, Roxy is a true teacher at heart and loves sharing her experience as a Mindbodyian, consultant, and studio owner.



To learn first-hand how Mindbody can position your business for success, [schedule a guided tour today.](#)

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