



The Nanny Agency School

How to launch and grow a nanny agency the right way!

Stephanie Bauchum

Module 2

Setting up your agency for success

Welcome to module 2 of The Nanny Agency School: How to launch and grow a nanny agency the right way! In this module, we'll work on setting up your agency for success. It's easy to want to jump right into the placement process, but it's important to make sure you have everything setup on the front end before the placements start rolling in.

There are great systems that you can create prior to placements that will make things easy for you and your staff. It all comes down to having a concrete plan. In this module, we will cover:

The Agency Setup
The Online Setup
The Client & Applicant Flow
The Website Setup

Perform each task at your own pace and share your updates in our private Facebook group!
Remember to email questions to nannyagencyschool@gmail.com

Module 2

The Agency Setup

To get started, let's lay the ground work with setting up your agency as an official business. You may have already completed this task, however it's a great time to review your documentation to make sure everything is done correctly. There are also great tax benefits with registering as an official business, along with legal protection that won't affect you personally in the event something were to happen. You don't need to hire a lawyer to lay the ground work, but you're welcome to seek legal advice. Some of these things can be done at a later date, but here's a to do list to get you started:

1. Decide the legal entity of your business i.e. Sole Proprietor, Joint Partnership, LLC or a Corporation.
2. Do an assumed name search to make sure your business name is available
3. Register the name in your local area and pay the legal processing fees.
4. If you're an LLC or corporation, find a local registered agent to receive documentation on your behalf
5. File for an EIN or Tax ID number. This will vary by country so please do your research.
6. Open a separate bank business account (very important!!)
7. Consider getting a separate business address. We'll cover inexpensive options
8. Get business insurance quotes. Wait until you officially start placing before paying for insurance.

Module 2

The Online Setup

Setting up your business online and on social media are important with branding, information and building an online “home” for clients and applicants. It’s the best way to officially present your business to the world! Once you’ve established the name of your business, go ahead and secure the domain name and social media accounts so they’re yours. You’d be surprised how fast names are taken. If someone else has your social media handle or website, don’t worry. Your distinct branding will help clients and applicants know who you are. We will touch on the look of your business in a later module. Here are a few tips to help you get started

1. Secure your domain. Try GoDaddy, Domain.com, Namecheap, Wix (free for 1 year when you buy a hosting package) or simply google “cheap domain name” and you’ll see good deals.
2. Grab all social media handles for Twitter, Facebook, Instagram, Pinterest and any other outlet you use regularly. Don’t stress about posting yet! You just want the name.
3. Secure an email address. You can simply do your agency’s name using Gmail, Yahoo or Hotmail, or consider getting a business mailbox. G-Suite is very user friendly
4. Shop website designers or consider building your own through Wix (my fav), Squarespace, GoDaddy or any web host company of your choice.

Module 2

The Client and Applicant Flow

Having a great system in place will literally be the lifeline of your agency. You need a project management tool that'll help make the flow of accepting new clients and caregivers stress free. Consider signing up for Asana, 17 Hats, Trello or another CRM System. We will dive deeper in this, but let's kick things off with a sample Client system flow:

1. Client reaches out through the website in need of a nanny.
2. The email comes directly to my G-suite email account
3. Copy and paste my email script for general nanny inquires. Personalize based on the request.
4. The script includes a link back to my "For Families" page online.
5. The "For Families" page includes a link to the family application and fees page.
6. Decide if you'd like to hop on a call before the application process. Some families may fill this out first.
7. Once the Client completes the application, they get an automated confirmation email
8. Send an email within 2-3 hours to schedule a Client Consultation via telephone, in person or Zoom. This can be automated.
9. Once the Client consultation is complete and they're ready to move forward, send the contract
10. Once contract is signed, send the invoice for a deposit
11. Once the deposit is paid, create a job description and start the search.
12. Reach out to candidates in your pool or do an online and social media job search
13. Send interested candidates to Clients
14. Setup interviews with candidates the Client would like to meet via Zoom or another virtual platform.
15. After the initial interview conduct in person meetings and trial days
16. If the Client is ready to hire and the candidate accepts, make sure there's a contract in place between the candidate and family
17. Collect the placement fee balance
18. Your job is done....almost. Schedule days ahead of time to check in with families and placements. Always stay in communication even after the placement is complete.

A lot? Yes, it sounds like it but if you have things in place, this is a no brainer. This same system will be applicable for candidates, so consider how things will look on both ends. Take time to think this over, but don't feel rushed. Things will fall into place as you continue growing your agency.

Module 2

The Website Setup

Most of your Clients and applicants will have the same questions. Your website should be simple, straight to the point and answer every question they have. Do not feel the need to have an elegant over the top website. You just want to make sure things are clear and each visitor knows exactly who you are and what you do. Whether you're designing the website on your own or plan to hire a designer, here are essentials you will need for a great agency site.

1. Home page
2. About Us
3. Meet the owner and team
4. Services we offer
5. Family or Client page
6. Client application
7. Fees and packages
8. Nanny/Candidate page
9. Candidate Application
10. Links to your social media pages
11. Email list form
12. Testimonials
13. Contact
14. Resources (optional)
15. Blog (option)

Please note: I would not include your agency contracts on your website. Keep them private and use an outside source like Docusign or Dubsado. If you do want your contract online, make it a private or password protected page. There are lots of eyes out there and your contract are your business!

Notes
