

# PERSONAL HISTORIAN JOB DESCRIPTION: LEGACY KEEPERS

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## I. BACKGROUND

At LEGACY KEEPERS, we know that everyone has a personal story to tell. The art of telling one's story to family and friends is often a distant and sometimes a lost gift. Now, with the launch of LEGACY KEEPERS, individuals can tell their stories and share their experiences, dreams, successes, photos, family trees, and even their favorite recipes. Relaxed interviews with a Personal Historian can result in a Legacy Book full of stories and mementos, a professionally-crafted Video Legacy DVD, and a Spoken Legacy audio CD set. Finally, individuals can commemorate and celebrate their family and loved ones in a unique and touching tribute with a single provider of every service.

## II. THE OPPORTUNITY

Our Personal Historians are at the heart of our business, interacting with clients in their homes and listening to their most personal stories. Some of our clients may be a bit hesitant at first, because they think their life is nothing special, but your job is to help them open up and share those moments that make every person's story special. In many cases, these packages are bought for them as a gift — and they need encouragement and support to speak openly about some very personal experiences.

Personal Historians are supplied with a training manual when they are chosen for the roster, but thorough training is provided through conference calls and online training systems before any Personal Historian actually interacts with a client.

We are looking for polite, empathetic people who are comfortable sitting down with clients and asking questions in a relaxed way. They will have secondary duties — delivering audio files and relaying brief notes/reports — but most importantly, we're looking for people who can put clients at ease.

## III. REQUIREMENTS

- No previous experience as a Personal Historian is required, though it is appreciated.
- Show interest, support, and empathy, and be positive during the entire process. Be kind, comforting, and unobtrusive. Listen intently to each client, to be able to engage politely if asked a question. Our clients are often seniors, and they deserve to be honored and respected. Maintain a polite demeanor, even if the clients' opinions vary from personal views.

- You will be asking questions the client has pre-selected from their Interview Guide, but you must be emotionally intelligent enough to steer the client gently back toward the important points if they stray off topic. You must help clients tell their most compelling story during their interview time.
- Pass a criminal background check.
- Be punctual for all meetings with clients. Arrive at the scheduled time. Arriving even five minutes late means that total pay for the assignment is docked 20%. A no-show results in immediate termination.
- Sign and abide by Code of Ethics (in “Independent Contractor Agreement: Personal Historian”) and at the end of this document for review.
- Cell phones and personal devices must be turned off. If a Personal Historian’s device makes noise during the call (even vibrate), total pay for the assignment is docked 20%.
- Dress in a conservative and tasteful manner during all client-facing activities. Absolutely no visible tattoos or piercings other than earrings, only conservative makeup, and no excessive cleavage. No jeans, no flip-flops, or athletic shoes.
- Do not rush clients to get in and out of interviews quickly.

#### IV. CODE OF ETHICS

I, Independent Contractor, as a member of Legacy Keepers’ Personal Historian team, will at all times adhere to the following **Code of Ethics**.

- **Punctuality**

Arrive punctually for interviews, and provide the best service possible to clients in the most timely manner possible.

- **Respect**

Respect the right of clients to have values and beliefs differing from those of the Personal Historian. A Personal Historian’s role is to record people’s experiences and not bear any judgment.

Factor in any personal or familial sensitivities, and take care to shape interviews in a considerate manner.

- **Privacy**

Privacy is always respected. No information shared during interviews will ever be released without express permission.

- **Professionalism**

Adhere to fair and decent business practices.

Wear office-appropriate clothing and use office-appropriate language.

Behave with the utmost respect with our clients and with any third parties involved in the process.

## V. HOW A TYPICAL ASSIGNMENT WORKS

- When an applicant is approved as a Personal Historian, he or she is listed on our Personal Historian Roster. He or she lists cities/areas he or she will serve without incurring travel expenses; jobs outside of those areas will pay modest, pre-approved travel costs.
- When a client purchases a package, we search the client's area for Personal Historians. Local Personal Historians are contacted, advised of the timeline, and can either ask to be considered or pass on the opportunity. If there are multiple Personal Historians available, we choose the Personal Historian based on the Personal Historians' customer satisfaction ratings and bios. The Legacy Coordinator schedules the first visit, attempting to accommodate the client's schedule and the Personal Historian's schedule. Interviews are generally scheduled at least one week in advance.
- When a Personal Historian is given his or her first assignment, he or she is "activated."
- Personal Historian must reach out to the client via phone or e-mail within 24 hours and say hello.
- Personal Historian conducts interviews in person at the client's place of residence, following a script provided by us.
- All interview visits are a minimum of two hours. Each client is interviewed for no more than four hours at a time, but if multiple clients are being interviewed, visits may be longer.
- Record interview on a digital audio recorder and deliver audio files promptly. Audio recordings must be at full volume and free and clear of background noise. If we don't have clear audio, we will not pay for those Personal Historian services. If there are portions where audio cannot be transcribed because of background noise, pay for the total assignment — across all interviews — will be docked 20%.
- Provide a written summary of each in-person interview no fewer than 100 words, outlining any positives or concerns regarding the client, the interview, or the project.

## VI. AFFILIATES & TOP-TIER (PUBLIC SPEAKING)

**All Personal Historians are immediately participants in our Affiliate program**, meaning that any time a Client mentions a Personal Historian's name while buying a package, the Personal Historian receives \$100. In addition, the Personal Historian can pass names/emails/phone numbers of potential leads to us and any of those leads resulting in a sale also earns the Personal Historian \$100.

**Some Personal Historians are offered training to become a Top-Tier Personal Historian** after they receive high customer satisfaction ratings. Top-Tier Personal Historians can assume an assertive role – we pay Personal Historians to attend and speak at public events like local conferences, representing the company. We also pay commission on leads that result in sales gathered at those events.

Driven Top-Tier Personal Historians may organize their own events, supported by our materials, which provide necessary training and plans. Events can be planned at local libraries, senior centers, retirement communities, VFWs, garden clubs, etc. Workshops / speeches along the lines of "How to Preserve Your Legacy... DIY or with Us" must not be hard-selling events, and we're not necessarily

looking for sales people. We're looking for people who understand and connect with the cause and want to spread the word about this new, fabulous service.

Some degree of comfort with public speaking is required, but genuine sincerity trumps slick presentation skills. We will pick Personal Historians who Clients felt really connected with them.

## **VII. COMPENSATION**

Compensation shall be \$50 per interview hour with a minimum of two (2) hours of interview per visit. Interview hours are measured by usable audio file length. Some visits will be four (4) interview hours.

When each interview is complete, the Personal Historian may submit an invoice (template is provided), or wait until all interviews are completed for an assignment to submit an invoice.

When a personal historian is assigned the first job, he/he or she will be granted a signing bonus of no less than \$30 and no more than \$50; the amount will be determined by Legacy Keepers.

## **VIII. HOW TO APPLY**

If mission suits your wants/needs, e-mail your resume and a cover letter to [info@legacykeepers.com](mailto:info@legacykeepers.com) with "PH Position" in the subject line. Suggest two good dates/times the following week, 8am-8pm EST, to be interviewed and the best number to call. Interviews may be conducted any day of the week.