



Effortlessly Manage Your Business

HOW PARTNERING UP WITH A
PREMIUM VIRTUAL ASSISTANT
COMPANY WILL HELP YOU TO
MANAGE AND GROW YOUR
BUSINESS, EFFORTLESSLY

A PUBLICATION OF

YOUR  VIRTUAL ASSISTANT

● EFFORTLESSLY MANAGE YOUR BUSINESS

PREPARING TO TAKE ON A VIRTUAL ASSISTANT



YOU'VE DONE AN AMAZING JOB

You have a thriving, busy business and you've done most of the work yourself.

Without the drive, commitment and motivation, not to mention the sheer volume of hours you've invested, your business wouldn't be where it is today.

In order to move your business to the next level though, you're going to need a hand.

That's where we come in.

In this eBook we'll show you:

- What you need to do before you take on a virtual assistant
- How to find the right VA for you
- How to get the very best from your virtual assistant
- How to be an even better entrepreneur.

YOUR  VIRTUAL ASSISTANT

THE OUTSOURCING JOURNEY

Simon is the successful and busy owner of a corporate coaching business that turns over in excess of \$500k a year

He has high expectations of himself and his team; he gets results for his clients because of these expectations. His business has come to a phase of change. He wants to start offering his clients online programmes in order to reach more people. He's currently turning all but his A-list clients away. Simon has recognised he needs to increase his team and manage his own time more carefully. He heard about us from a colleague and booked his discovery call. This e-book will take you through Simon's outsourcing journey with us.

What you need to do before you take on a virtual assistant

To help your VA love your cause as much as you do (and they need to), you'll need to do some homework first.

You don't just want your virtual assistant to send out your newsletter; you want them to help you to grow your email list, find out what your clients most want to see in your newsletter, report back to you once the statistics come in, and remind you in plenty of time when they need copy for your next newsletter.

By letting them know your goals and your mission, you enable them to become a forward thinking partner in your business, proactive rather than reactive.

And then, they will go above and beyond because they know where you're going.

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SOME HOMEWORK FOR YOU

- Have a business plan in place
- Identify your goals and the resources needed to achieve these
- Know your financials; what is your budget, your cash flow, your forecast?
- Know exactly what your strengths and weaknesses are (you need your VA to compliment you, not duplicate you)
- Draft your 'perfect' job description, what you should be spending your time doing
- Draft your [VA's job description](#); include personal qualities you are looking for, skills, KPIs and a [wish list](#) of tasks.

YOU DON'T NEED TO SPEND HOURS THAT YOU DON'T HAVE, PLANNING AND DRAFTING

- Make some notes
- Talk to your accountant
- Talk to your coach or mentor
- Know exactly what you want your business to achieve and what you need on a personal level

Once you've done this, you'll have a clearer picture of how you want your VA relationship to work.

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DEFINITION OF A VIRTUAL ASSISTANT

YOUR  VIRTUAL ASSISTANT

How to find the right Virtual Assistant for you

We've identified that to reach your goals you need to delegate.

With so many options out there, it's easy to be overwhelmed by the process.

Let's take a minute to define a virtual assistant.

An ideal VA is not someone who types a quick document for you, but rather someone who types ALL of your documents... someone who has your big picture in mind, rather than the task at hand.

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OUTSOURCING OPTIONS

YOUR  VIRTUAL ASSISTANT

1. A premium virtual assistant team

That's us! And here's why this is my first suggestion for outsourcing. A small, executive level team is personal; there's a strong relationship between your dedicated VA, the VA business owner, and yourself. There's also scope and skills within the team to grow with your business. So you have the benefit of a personal relationship with your senior VA, with the additional bonus of access to expert skillsets within the team when you need them.

2. A sole virtual assistant

Sole VAs often have a small number of clients (there are a limited number of hours they have available) and may specialise in a certain skill set or industry. There are real estate VAs, VAs who specialise in law, those who are unbelievable at admin, and those whose marketing skills will blow you away. Then there are the VAs who do it all, the jack of all trades.

3. Outsourcing sites

Fiver, Guru or Upwork (to name a few). Less a personal virtual assistant than a source of skills, this can be an option if you're just starting to delegate and outsource aspects of your to-do list. These sites are very cost effective but there are risks, so be sure to check online testimonials, don't pay until you're satisfied with the completed result, and be very, very clear on your expectations. We've found some tasks are more suited to this option than others, and we use these resources when we can save a client money.

EFFORTLESSLY MANAGE YOUR
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YOUR BACKGROUND

YOUR  VIRTUAL ASSISTANT

How to get the very best from your VA

In order to get the very best from your VA so you can really start to maximise your own time (or even ... gasp ... put those feet up for a minute), you need to make sure your VA has all of the tools needed to be the partner in business you need them to be.

THE OUTSOURCING JOURNEY

During our discovery session with Simon we discussed his KPIs, his goals and challenges

We discussed our service and structure, and decided Simon is looking for an executive level VA to manage his daily emails, diary and admin while project managing the creation of his pilot online programme. Simon wanted to get started ASAP so we sent him his info pack and letter of engagement to ensure his confidentiality and IP is protected, and our T&Cs are understood.

I had the ideal senior VA in mind for Simon, and included their profile along with an invitation for our more in-depth strategy Skype where his dedicated, senior VA would also join us.

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GETTING STARTED

YOUR  VIRTUAL ASSISTANT

Your Story – Company Background

START WITH A FEW SIMPLE TASKS

Once you feel comfortable the relationship is going to work, think about what information you have that you could share with your VA. The more your VA knows about your business, the more value they can add to it, and the quicker they will be able to make a difference to your working day.

Types of information you could share:

- Business Plan
- Mission and Vision Statements
- Company Profile

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YOUR BACKGROUND

IF YOU DON'T ALREADY HAVE ONE, WE ENCOURAGE YOU TO PRODUCE A BRAND 'VOICE' GUIDE

Another task your VA could work on that will help when communicating across all areas of your business using the correct and consistent word, tone and brand.

Having your logos, fonts and colour palettes in one document helps us to be consistent in all of your documents and online, without having to come back to you for clarification.

Use your brand guide when sending media packs or sharing with affiliates, and it's invaluable when collaborating with other service providers.

THE OUTSOURCING JOURNEY

Simon prepared for his initial Skype by creating a folder in dropbox and uploading all of his company information

Critical to Simon is that all projects are completed on time, on budget and that his VA is proactive in looking for improvements and ways to add value for him and his clients. His expectations were clearly outlined during our Skype call and incorporated in his Dropbox documentation.

This prep is priceless for his VA, meaning they know exactly what's expected, and what his focus and preferences are going into the relationship.

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GREAT TOOLS TO USE

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Collaboration

There are a number of tried and tested tools that make collaborating with your VA as simple as if they were in your office.

We'll get to know the tools you love to use while introducing you to some of our favourites.

THE OUTSOURCING JOURNEY

Simon and his VA Skype weekly to discuss current projects as well as routine tasks his VA is handling for him

This gives them both a chance to look at priorities, address any concerns, and talk about what's coming up in the week ahead.

The various projects around his online programme are managed using his PM tool of choice, Basecamp.

Communications are kept within the projects and a group Skype at each milestone means the team can brainstorm and connect on a regular basis.

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GETTING THINGS ORGANISED

YOUR  VIRTUAL ASSISTANT

Procedures

We've worked with clients who have no procedures at all and panic a bit at the thought of what's involved bringing their VA up to speed. Other clients have their SOPs well-organised and it's a simple matter of emailing them to us or sharing via Dropbox or Google Drive.

The investment you and your VA put into your procedures pays for itself in many ways.

Having procedures documented also helps to find efficiencies and determine how to make your processes even better. Constant improvement.

Benefits of a procedures (operations) manual are:

- Adds value to your business
- Documents intellectual property
- Reduces training/induction time for new team members
- Reduces your dependency on your VA
- Helps to identify areas for improvement/increased efficiencies

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GETTING THINGS ORGANISED

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If you don't have procedures or you're unsure how to document what you want your VA to do, here's a simple action list:

1. Identify the task you are going to outsource.
2. Use Skype or Teamviewer to meet with your VA where you can both see your screen.
3. Work through the task as your VA takes notes.
4. Don't forget to communicate:
 - a. The desired outcome of the task.
 - b. Deadline and frequency of the task.
 - c. Any additional resources needed to complete the task.
 - d. Your expectations.
5. Discuss where you want your procedures stored, how they are to be shared, whether they are subject to document control, if you want a hyperlinked table of contents, or workflow diagram which pulls your procedures together.

● NOTE

A tool we recommend for your procedures is [Sweet Process](#)

This makes documenting your procedures easy (and fun!), you can share procedures as your team grows, and monitor the work done by procedure.

A person is working at a desk with a laptop and a tablet. The person's hands are visible, holding a pen over a notebook. The background is a blurred office setting.

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5 TOP TIPS FOR COLLABORATION

YOUR  VIRTUAL ASSISTANT

HERE ARE OUR 5 TOP TIPS FOR COLLABORATING WITH YOUR VA:

1. LOGINS

[Lastpass](#) for is a free password vault. You can set up folders within your vault to keep your logins organized, and LastPass will also suggest encrypted, secure passwords so you can keep hackers out of your online accounts. One of the best features of LastPass is the ability to share login information (meaning they can login but they DON'T SEE your login details) or give logins to trusted members of your team (meaning they CAN SEE your login details). This tool saves so much time when it comes to logging into your sites (no more searching for or resetting lost passwords) and it's safe. No more 'one password fits all'!

2. SHARE DOCUMENTS

Cloud Storage is more essential than ever. Now you can work anywhere, anytime, from any device, with a team based anywhere in the world.

A good idea is to use [Dropbox](#) for all of your docs, photos and videos, especially those you want to share with your team.

[Google Drive](#) is ideal for collaboration, particularly project work. Drive is our preferred method when we need to collaborate on a document, we love the ability to update live and have a number of people working on a document simultaneously.



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5 TOP TIPS FOR COLLABORATION

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3. MANAGE PROJECTS

Our cloud-based project management tool is [Proworkflow](#). It's super simple to use and it enables us to store all the files, tasks, due dates, tracked time and discussions with the appropriate project. We use it for everything from ongoing, open-ended projects (eg content marketing) to one-time, fixed-date projects (eg LinkedIn advertising campaigns). Other popular PM tools our clients are using include Asana, Trello, Basecamp, Wrike and Workflowmax.

4. COMMUNICATIONS

Think about using [Skype](#) as an [alternative to email](#), particularly when communicating with your team. It's a great way to ask a quick question without having to draft an email (and it avoids adding to email overwhelm!); so many of our conversations now take place by way of Skype SMS or Facebook messaging.

5. SHARE WHAT YOU SEE

Try [SnagIt](#) for sharing screenshots and brief screencasts with your team. It makes it possible to quickly and easily share what you see, rather than trying to describe it via email. It has numerous annotation tools, so you can highlight details and focus attention on specific items. You can also upload a screencast with a click. It automatically copies the link to the screencast to the clipboard, so you simply paste it into an email and send it to your colleagues.

Feedback

Possibly the most important part of your Relationship.

Good, and not so good, it is critical you are honest and forthcoming with your feedback.

EFFORTLESSLY MANAGE YOUR BUSINESS

BE THE BEST YOU CAN BE



How to be an even better entrepreneur

Now that you've got your trusty VA and you're part of a dynamic team, what's next?

The first priority is to look at the time you've saved yourself by partnering up. Guard this time religiously! If it used to take you 2 hours each day to respond to emails and is now taking you half an hour, block out the 1.5 hours in your calendar. Go back to the actions you did at the start of this eBook ('Homework' on page 4) and take time to plan.

Try using the [SMART goal system](#) to help you achieve your goals. By doing this you can break down your to-do list into easy to manage, prioritised tasks. You now have your VA to help you work through these tasks! Identify the tasks only you can do and slot these into your one and a half hour time slots blocked out in your calendar. Constantly monitor how you are tracking on your goals.

THE OUTSOURCING JOURNEY

Simon is now able to dedicate Fridays to being creative and working on his business

Having his VA helping with the operational side of his business means he no longer has to struggle with admin, his cash flow has improved now that someone is following up on overdue accounts, and his customers love the fact that their questions are answered promptly.

Simon is now utilising a number of VAs in our team, although his main relationship is with his dedicated VA; they even catch up for coffee when he's in Christchurch where she's based!

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BE THE BEST YOU
CAN BE

MY TOP 10 TIPS FOR BEING AN EVEN BETTER ENTREPRENEUR

1. Set aside time to plan.
2. Don't fill your time with tasks someone else can do.
3. Invest time in training your VA and have them document your procedures. Build an operations manual.
4. **[really important]** Enjoy being a successful business owner and face each day with a passion. If you are not doing this, what needs to change so you can?
5. Acknowledge what you have achieved.
6. Surround yourself with thought leaders and people you admire or those who inspire you. It's contagious!
7. When you relapse from time to time, pick yourself back up and go forth. No-one is amazing all the time.
8. It's all in the detail. Cash Flow forecasts, budgets, strategies, goals, plans and templates. They will keep you honest, focused and answerable.
9. Be realistic about your goals. Don't set yourself up to fail.
10. Keep learning. Whether it's a new tool each month, refining your expertise or taking the time to read about changes in your industry. Constant growth feeds the mind!

That's it. We'd love to hear any questions you have after reading this.

Email Justine or Tweet us [@yourvaconz](https://twitter.com/yourvaconz)

YOUR VIRTUAL ASSISTANT

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