



# PREPARING TO WORK WITH A VIRTUAL ASSISTANT

## YOU KNOW YOU NEED HELP, BUT YOU AREN'T SURE WHAT WITH

Are you at a point in your business where you are starting to feel completely overwhelmed with everything, never seem to get any free time and working until all hours trying to get it all done?

You would like to hire a Virtual Assistant, but don't really know where to start or what to hand over. Don't panic - this is what I hear from most potential clients and this sheet has been designed to help.

## WHERE IS YOUR TIME GOING?



The first place to start is to do a time audit. I know this sounds like a chore, but it's essential to find out what tasks you are currently undertaking and how much time you are spending on them - you might get a shock!

Spend a week or a month recording the types of task you are doing on a regular basis (include every little thing, as trivial as it may seem) and track how long each task takes you. You might find it helpful to use free software such as Toggl, as it calculates everything for you. Alternatively, you can use the free time audit template at the end of this leaflet.

Now it's time to review your list:-

Start by highlighting the tasks that only you can do, or the ones you really WANT to do - everything else on the list can essentially be delegated.

Go through the list of tasks that can be delegated and give them 2 ranks out of 10 - one rank for the simplicity of the task and one for its duration. For example, if a task is easy, rank it highly (10/10) and if it is time consuming, also rank it highly (10/10)

Review your list again and look for items that have a high rank for simplicity and duration.

***These are the tasks that can be outsourced easily and will save you the most time!***

# WHAT TASKS CAN A VA HELP WITH?



So you have your list of tasks, but you still aren't really sure what a VA does or what they could help you with. Outlined below are some of the tasks a VA could perform for you. They are by no means exhaustive and every VA will have a different skill set or niche and that's why completing the time audit prior to your initial call will help you get clarity around the specific help you need.

## SOCIAL MEDIA

- Setting up social media accounts
- Research and create content
- Find and edit images
- Create branded graphics
- Schedule and manage posts
- Create a content calendar
- Create ad campaigns

## GENERAL ADMIN

- Email management
- Diary management
- Data entry
- Research tasks
- Document creation
- Invoicing
- Arranging travel
- CRM Management
- Proofreading and editing

## WEBSITE / BLOG

- Website maintenance
- Blog formatting
- SEO
- Moderating blog comments

## NEWSLETTERS

- Setting up a Mailchimp account
- Creating branded templates
- Writing content, or
- Proof-reading and editing your content
- Sending the newsletter
- Analysing reader stats

## GRAPHIC DESIGN

- Logo design
- Branding
- Lead magnet design
- Newsletter design
- Design of promotional materials
- E-book design
- Designing branded social media graphics
- Infographic design
- E-magazine design

## FINANCE

- Expense Management
- Bookkeeping
- Credit control
- Invoicing





# MANAGING EXPECTATIONS

## WHEN WORKING WITH A VIRTUAL ASSISTANT

Working with a Virtual Assistant might be a completely new concept for you, so it's therefore important to set realistic expectations about working with one.

Here are a few useful pointers:-

- ➔ Allow for a settling-in period, just as you would when taking on a new employee. Your VA needs to get to grips with your business, how you work and familiarise themselves with any new systems you would like them to work with.
- ➔ As a VA is also an independent business owner, it isn't possible for you to set priorities for them in terms of their working week. Most VA's will have more than one client to consider, so it's unrealistic to expect a quick turnaround on everything, as you might expect with an employee.
- ➔ Plan ahead! If you are a 'last-minute' person, you need to plan ahead the tasks you are giving your VA, so that they can also plan their working week.
- ➔ Don't expect your VA to be able to read your mind. Communicate clearly what you want doing and give them what they need from you to be able to complete the task.
- ➔ Deadlines are essential for things to work efficiently and sometimes it's easy to underestimate the time some tasks take to complete. Try and be realistic about the timescale within which you are asking for things to be done. The best VA in the world can't fit into a couple of hours what should realistically take a day!
- ➔ VA's are not available 24 hours per day. The reality is that many virtual assistants are not available during regular business hours; they will do their work in the evenings and on weekends, with some VA's working part-time on weekdays only.
- ➔ Ultimately, a VA has a vested interest in your business, but it's important to remember that they are a fellow business professional and not an employee, so are able to set their own rules about how they work and manage their client base.

# WHAT DO I DO NEXT?



I completely understand how hard it must be to hand over the reins for some of the tasks within your business.

You might find it useful to chat with other business owners who use a VA, or have experience of working with a VA, and ask them for their thoughts and experiences.

You can also check out testimonials from the VA's current or previous clients.

## I'M GOING TO GO FOR IT! WHAT NOW?



Most VA's offer a free consultation call - sometimes called a discovery call, where you can discuss your needs in more detail. I offer a free hour consultation either by Skype or telephone.



It's really helpful if, before the call, you have worked out a rough idea of the tasks you would like to delegate, as it will give you both a good starting point.



Think about how you prefer to communicate and establish with your VA how often you would like to be updated on progress.



Discuss with your VA how you will share documentation, i.e Google Drive, Dropbox



If you haven't already, ask for rates and details of what packages your VA offers, then you can discuss how many hours you need and if you need regular support or just on an ad-hoc basis.



During the call, a VA will discuss with you their terms and conditions,. The key to a great working relationship with a VA is communication and establishing boundaries at the outset is important to prevent misunderstandings in the future.

This initial consultation is a two-way process and is the perfect opportunity for both you and your VA to see if you are a good fit. Don't under-estimate the importance of your gut instinct and don't be scared to ask questions - this might be completely uncharted territory for you and there are no silly questions!