

# THE ULTIMATE GUIDE TO BUSINESS GROWTH WITH VIRTUAL ASSISTANTS



# The Basics

## ***What is a Virtual Assistant?***

Basically, a virtual assistant performs administrative and other support tasks for your business from a remote location. VAs work part-time, full-time, or on a temporary basis. Many VAs work as independent contractors, whereas others work through virtual assistant companies. The Virtual Hub is one type of VA company, but there are several models of VA companies and agencies. But we'll explain that later!

"Virtual assistant" is used broadly to describe virtual workers who do admin tasks, yet VAs are not one-size-fits-all! Entrepreneurs hire virtual assistants to perform all manner of tasks that can be done online (or via telephone), but VAs vary in experience and skillset. No single VA could cover all those possibilities. Virtual assistants can be classified into two broad categories: generalists or specialists.

Generalist VAs perform a range of basic, administrative tasks, and specialist VAs possess higher-level expertise in one or more specific business functions, such as social media or systems automation. There's no one standard for classifying specialist VAs - they could specialize in any number of business functions or specific software processes.

At The Virtual Hub, we group virtual assistants into five, broad categories. They are **generalist**, **social media**, **content management**, **digital marketing**, and **systems** and we describe each of these VA segments, as well as what they do, later in this post. Keep in mind that these are five "buckets" we've created and find that they cover most business's VA needs.

However, VAs aren't necessarily limited to those categories. You can find VAs niched by other skills and/or experience (e.g., lead generation, customer support), as some may describe themselves by the industry they serve (e.g., real estate, health care).

## ***What Can a Virtual Assistant Do for Me?***

Virtual assistants support your business remotely by completing administrative tasks you assign to them. Most often, these tasks are repeatable and systemized tasks that must be done but are not necessarily key drivers of the business. This might seem silly, but we want to emphasize the word "tasks."

That is, virtual assistants execute tasks you assign to them, based upon a step-by-step process you created. What to outsource to a virtual assistant must be determined by you, the business

owner. By and large, VAs neither decide what needs to be done nor how the tasks are to be performed.

Later, we'll dive into how to select tasks to assign to a VA, how to map out processes and instructions for your VA, and how to train and manage them. Right now, let's take a look at the benefits of hiring a virtual assistant.

### ***Who Can Benefit from a Virtual Assistant?***

Any online entrepreneur who can no longer manage all aspects of their operation can reap huge benefits from hiring a virtual assistant. Needing to turn down client work, working longer and longer hours each week just to keep up, and missing deadlines are clear signals that a business owner needs some help.

The "virtual" in virtual assistant brings to mind someone who works with an online - or virtual - business. But virtual businesses aren't the only one who can benefit. Even brick-and-mortar business owners, local service-based businesses, and larger corporations can benefit from hiring a VA! Just because the business operates from a specific location doesn't mean that their assistant has to. Local businesses like chiropractors, boutiques, and restaurants would be smart to outsource administrative tasks to a virtual assistant.

### ***Why Hire a Virtual Assistant?***

Adding a virtual assistant to your team reduces your workload, saving you time and frustration. Plus, it allows you more time to focus your attention on the business functions that drive your business, rather than wasting your time on routine tasks. Plus, hiring a virtual assistant is both cost-effective and efficient. Virtual assistant services will cost far less than hiring part- or full-time employee. Among other things (e.g., insurance, payroll), VAs operate with their own tools and out of their own space or with the resources provided by the virtual assistant companies they work for. You don't have to buy more equipment or provide office space.

Further, working with VAs can involve some flexibility, agility, and creativity. For example, instead of hiring a single, highly skilled assistant to manage multiple business functions, entrepreneurs can invest in two (or more!) VAs, each with the specific skill set necessary. Say you wanted to delegate tasks in both social media and content management tasks. You could hire one, part-time social media VA and one, part-time content management VA, which will cost you far less than investing in a content marketing strategist to cover both sets of skills. Now that we have the gist of what virtual assistants and why they're becoming so popular, let's dig deeper into their world and take a look at some of the specific things they can do for you.

# Types of Virtual Assistants

## **Generalist Virtual Assistant**

Generalist VAs are typically like administrative professionals we encounter in brick and mortar business settings. Think of a generalist VA as being a “virtual secretary” or “virtual personal assistant.” For example, both may support two or more business functions and carry out a variety of administrative tasks, such as data entry, creating documents, managing calendars and appointments, and responding to emails.

Generalist VAs typically don’t “own” all tasks within a specific “department” or function of your business. Instead, generalists tend to perform tasks across functions, such as marketing, basic bookkeeping, and customer service. Although generalist VAs have a broader range of administrative skills than specialist VAs, they often need more training than specialists do, which often surprises business owners. Why is this the case? Although they’re agile and well-versed in a variety of areas, the only way for them to learn the way you do things is for you to teach it to them.

### *What Can Generalist VAs Do?*

Generalist VAs can help business owners in a ton of ways. This list provides but a few examples of the virtual assistant services a generalist VA can perform.

- Create invoices
- Create documents
- Transcribe audio/video
- Format reports
- Design simple graphics in an application such as Canva
- Format blog posts
- Follow up on late payments
- Manage your email inbox
- Schedule social media
- Research business topics
- Schedule appointments

## **Systems Virtual Assistant**

The first specialist virtual assistant we’ll describe is the systems virtual assistant, who’s focused on helping the owner manage the systems and operations of the business. Systems VAs are very tech-savvy. They’re skilled in technological areas such as basic website maintenance,

creating automations with tools such as Zapier, and developing repeatable workflows for routine client interactions within your email manager or software such as Dubsado.

### *What Can Systems VAs Do?*

These tasks are among the capabilities of a systems virtual assistant:

- Project manage website redesign with the web developer
- Add and manage a Live Chat feature to a website
- Research, install, and update useful website plugins and widgets
- Create a pop-up form for the website
- Procure and set up audio and video equipment for podcasting and video recording
- Set up an automated client onboarding workflow
- Research and learn a new software automation - and teach it to the business owner

### **Content Management Virtual Assistant**

Hiring a virtual assistant for content management allows business owners to hand off the bulk of the tactics around their content marketing efforts. It bears repeating: The entrepreneur owns the strategy, developing content plan and creating the content. The content management VA implements the strategy by carrying out the assigned tasks.

And keep this best practice in mind: content creation should take up only 20% of your content marketing efforts. It's coming up with ideas, publishing, repurposing, and promoting the content that should make up the other 80%. The content management virtual assistant can research and provide the traffic-generating ideas to the owner, who then the content, based on those ideas. The VA can step back in again and take care of publishing, promoting, and repurposing.

Like social media, content management is an essential yet highly time-consuming activity, particularly for small businesses. In fact, 51% of marketing professionals cite content creation and management as their #1 business challenge! If you want to optimize SEO and convert more visitors to leads and buyers, consistent, relevant content is a must!

Speaking of SEO, content management virtual assistants can handle tasks that will help you make your content more SEO-friendly. Task them with reviewing your blog content for opportunities to link to others' websites, as well as to link concepts back to other posts within your own site.

Finally, you can task your content management VA with organizing your written content for optimal readability and SEO by properly creating the structure of blog posts. The Yoast plugin

for WordPress is a simple tool VAs can use to assess both keyword density and heading/subheading structure. If you who struggle to keep up with and remain consistent in your content creation efforts, hiring a content management virtual assistant could be game-changing for you.

### *What Can Content Management VAs Do?*

Exactly what can be delegated to a content management VA will depend upon his or her individual strengths and weaknesses and how much you are willing to train them! You can hire a virtual assistant for content management and task them with some or all of the following:

- Research hashtags and keywords
- Create infographics to include in blog posts
- Research trending topics in the industry
- Review competitor websites to generate ideas
- Monitor blog traffic
- Edit, proofread, and format blog posts
- Add images with SEO-friendly file names and alt-text to blog posts
- Assess readability and SEO with the Yoast WordPress plugin
- Repurpose existing content

### ***Digital Marketing Virtual Assistant***

Whereas social media (described below) and content management VAs focus on visibility and marketing content, digital marketing virtual assistants implement tactics around business sales content and strategy. Digital marketing VAs possess additional expertise in the back-end tasks for digital sales efforts, although they may also have their hands in some content management tasks. When these tasks are delegated to the VA, it allows the business owner to focus on the digital marketing strategy and on creating and optimizing their sales messages.

The tactics of digital marketing require behind-the-scenes technical steps. For example, savvy entrepreneurs will leverage their time to script and rehearse a presentation they need to give - instead of wasting time creating the perfect webinar slide deck - and outsource slide show design to a virtual assistant. Similarly, digital marketing VAs know the tools for setting up webinar tech and automated email sequences.

For entrepreneurs who prefer to spend their time optimizing their sales copy and education-based marketing content (e.g., for webinars) than on setting up the delivery of their sales processes, hiring a virtual assistant for digital marketing is the way to go.

## *What Can Digital Marketing VAs Do?*

Tasks to assign to a digital marketing VA may include the following:

- Convert blog posts into ebooks and other PDF downloads for lead generation
- Research and summarize webinar platform options
- Design a webinar landing page (owner provides copy)
- Create a webinar slide deck
- Automate a series of emails the business owner wrote/created
- Set up an evergreen webinar

## **Social Media Virtual Assistant**

A generalist VA can handle social media basics, such as scheduling posts and creating simple graphics. But if you need help with higher-level social media tasks, you'll want to hire a virtual assistant who specializes in social media.

Typically, social media virtual assistants are highly proficient in all (or most of) the major social media platforms (Facebook, twitter, Instagram, YouTube and LinkedIn). Plus, some are experts in one platform. Social media VAs not only schedule the posts, but they also implement and monitor all aspects of your social media initiatives.

With a social media VA, the business owner always remains responsible for the strategy behind it, but has the VA execute the entire media function. Key decisions the entrepreneur needs to make include selecting the social platforms, setting goals, and identifying themes and key messages. The social media VA carries out the tactics to bring the owner's strategy to life.

Although social media is important for nearly all businesses, it can be downright vital for small businesses without huge advertising budgets. However, it tends to take up a boatload of time - time that would be better spent focused on clients and prospects. Therefore, many savvy business owners effectively delegate to a virtual assistant who specializes in social media.

## *What Can Social Media VAs Do?*

Here's a few of the things that business owners outsource to virtual assistants who specialize in social media:

- Set up social media profiles
- Create content calendars
- Automate posts with scheduling tools such as Buffer and (our favorite) Hootsuite

- Manage Facebook group engagement
- Manage content database
- Track and report metrics
- Research and implement Facebook contests
- Summarize and provide feedback on audience engagement

### **What A Virtual Assistant Is Not**

Let's review! A virtual assistant is a remote employee who executes tasks. Business owners tell them specifically what to do and how to do it, step-by-step. Anything beyond tasks, such as project management, operations management, overseeing other team members, or developing strategy, falls to the business owner or another type of virtual team member. That is, a virtual assistant is not interchangeable with:

- *A Project Manager (PM)*: Virtual project managers take digital projects, such as developing websites, setting up webinars, and launching products and services, from start to finish. They manage the budget and resources, create the plan, delegate tasks, track progress, and measure results.
- *An Online Business Manager (OBM)*: Online business managers are virtual professionals who oversee online operations for the business owner. Project management also falls within the realm of OBMs, but they're usually managing multiple projects at the same time. Plus, they track metrics and manage the operations, ensuring there are systems and workflows across business functions. Finally, they oversee other people working in the business, including contractors (e.g., bookkeeper, graphic designer), as well as other team members (e.g., one or more VAs).
- *An Integrator*: Gino Wickman and Mark C. Winters introduced the concept of integrators to the business world in their book *Rocket Fuel: The One Essential Combination that Will Get You More of What You Want from Your Business*. Integrators are OBMs with additional strategic skills and abilities. When an entrepreneur hires a VA, a PM, or an OBM, they remain the owners of the strategy. On the other hand, integrators become true, strategic partners with the business owner. Integrators benefit entrepreneurs who excel in generating ideas and developing the vision but who struggle with execution. In this relationship, the entrepreneur owns the vision, but he or she hands the strategy off to the integrator who aligns the team and the systems with the vision.



## **Final Notes on What VAs Cannot Do**

For one, a virtual assistant can't do it all. Some entrepreneurs seem to think that any single VA can take on tasks across all business functions. It's called the 'Myth of the Super VA,' and it's thoroughly debunked by Chris Ducker.

Finally, you can't invite a VA to join your team and expect them to tell you what you need help with! Often, entrepreneurs wait until they're totally overwhelmed before they consider hiring a VA. They quickly and desperately hire someone but fail to plan. For some reason, they have the idea that the VA is just going to know what to do, without being trained on specific, clearly defined and documented tasks from the business owner. No matter how highly trained a VA is, one cannot figure out how to apply their skills to your business. You must provide the specific tasks lists and instructions!

# When to Hire a Virtual Assistant

If you're looking to hire your first (or second, or fifth) virtual assistant, it's likely because you're in a bit of a predicament. The good news is you got your business off the ground and it's been growing. The bad news is you're now working very near or at capacity. Therefore, you can't grow any further because you're out of time for attracting new clients much less working with them. You may find yourself working longer and longer hours to meet the demand and/or you may fall behind in routine tasks within your business.

In short, you've reached what Charlie Gilkey's calls "the crucible." This is stage 3 in his model of the life cycle of a small business where entrepreneurs find themselves, "at the delightfully frustrating point at which they're booked solid and working at full steam, but the demand for their goods and services outstrips their ability to meet it. Something has to give, but entrepreneurs often don't want to let go of the business activities that have gotten them to this stage."

If you want to continue to grow your business - and keep your sanity in the process - it's essential to let go of the idea that you have to do everything in your business. In fact, not only do you not have to do everything in your business, you shouldn't do everything in your business.

We're going to explain why in more detail below, but first let's take a look at some of the telltale signs that it's time to hire a virtual assistant.

## ***Hire a Virtual Assistant Before You're Too Swamped***

Ideally, a business owner recognizes they're approaching capacity before they're buried in their business. This allows them to take time to track where they spend their time, document how they perform routine tasks, and determine which they are willing and able to delegate. (In the next section, we'll walk you through how to go through that process for yourself and identify what you should stop doing and delegate to someone else.)

If you're in this position, a gut check is probably all that you need to recognize that something's gotta give. But just in case you need a little validation, here are some of the signs that it's time for you to hire a VA.

- You're spending most of your time - or simply more than you'd like to - on routine administrative tasks.
- You're out of control - you're missing deadlines and tasks are falling through the cracks.
- You're turning work away.

- You're working all the time just to keep up.
- Your family is complaining they never see you.
- You have big ideas you have no time to implement.
- You're super stressed and it's taking a toll on your health.
- Your business use to excite you, but now it bums you out.
- You're not spending enough time in your zone of genius.

And speaking of your zone of genius, let's take a look at how it relates to when you should hire a virtual assistant and how to calculate exactly what your zone of genius is worth in your business.

### ***Hire a Virtual Assistant Before You Think You're "Ready"***

In the Charlie Gilkey quote above, he notes that many entrepreneurs don't feel ready to give up some of the tasks that have brought them to this stage in their business. They think they must keep doing what they've been doing in order to continue to achieve success. Chris Ducker also refers to this as "Superhero Syndrome," and notes that it leads to burnout and that the solution is to learn to delegate.

#### *Find Out What You Need to Stop Doing*

One of the reasons you don't feel ready is simply because you have neither examined the value of your time nor defined your "genius tasks." In his book *The Stop Doing List*, Matt Malouf defines genius tasks as, "a task that has great financial return, that you love to do, and that you are really good at." According to Malouf, genius tasks usually fall under sales, marketing, team management, product or service delivery, and system development.

In the chapter titled, "Your Time Is Worth Money!" he states:

Along the way, as we became business owners, many of us lost track of knowing the value of our time. We started looking at the list of tasks we had to complete, rather than understanding what tasks or roles were essential to complete to maximise our hourly return as the business owner. Often we sacrifice our time on tasks that, however necessary they are, add nothing to the bottom line. We start treating all tasks as equal and, instead of guarding our time as our most precious commodity and carefully choosing where we will spend it, we waste it.

### *Calculate What Your Time is Worth*

Malouf also offers a simple formula for calculating what your time is really worth, which you can use as a yardstick for assessing your activities. Calculate your hourly rate by dividing your annual income goal first by the number of weeks you want to work each year, then by the number of hours a week you intend to work. Once you calculate your rate, you use it to decide whether you're getting a positive return on investment on the tasks you're completing.

### *Get Ready to Automate and Delegate*

To find out what belongs on your stop doing list, perform the 2-week time tracking activity described in the next section. Compare the tasks you're completing, along with the amount of time they take, to your hourly rate. Anything that falls outside of your genius tasks and is worth less than your hourly rate should be automated or delegated to someone else.

So, if you feel that you'd like to hire a virtual assistant, but you're not quite ready, that's actually a sign to let you know that you need to get ready and figure out what you should stop doing! If you don't, you're going to find yourself working longer and longer hours, performing low impact tasks just to keep up with the business and hindering your ability to grow your business.

To learn more about what you should stop doing, tune into The Virtual Hub's three-part podcast series with Matt Malouf himself. In the series, he first addresses the mindset you need to develop to stop doing and delegate, then how to create your stop doing list and step into your genius zone, and finally how to effectively stop doing and delegate.

### ***Hire a Virtual Assistant after You've Automated What You Can***

We 100% believe that hiring a virtual assistant can be the first step toward growing and scaling your business, which will impact not only your own business and life, but it will also ripple out and create massive benefits to your local and the global economy. However, it does not make sense to hire a VA, which will cost you hundreds of dollars a month, if you haven't first invested in automation tools for processes. Many of these tools are free (or at least have a free version that may meet your current needs or include a low-cost monthly fee.

## *Examples of Automation Tools*

For example, Dubsado is a popular all-in-one CRM and process management tool which is popular among freelancers and other entrepreneurs. The tool can manage your leads and workflows by automating routine communication emails, invoicing and more. And the subscription will cost you just \$35 a month or less, depending upon the payment plan you select.

Another app for productivity and process automation is Zapier, which can connect tasks and actions among hundreds of software tools. Zapier passes information between apps to create workflows known as “Zaps” and can automate steps in processes related to email newsletters, project management, and customer support, among many others. If you want to learn more about the kinds of things Zapier allows you to automate, they have compiled a list of over 300 popular Zaps - but the possibilities are literally almost limitless. The free level of Zapier allows you to have five active Zaps at a time and will perform 100 tasks a month via those Zaps, and the premium options start at roughly \$20 each month.

If you are interested in learning more about automation, but you aren’t even sure where you might apply automation within your business, Business 2 Community covers why an automation strategy is essential and lists business functions where you can put it to use in your business.

### ***Hire a Virtual Assistant as Soon as You Know Exactly What They’ll Do***

Although we’re recommending that you hire a VA before you feel ready, you mustn’t hire a virtual assistant before you’ve gotten your business ready to hand things off. That is, don’t hire a VA until you’ve invested the time to:

- Figure out exactly what tasks they will perform.
- Determine how they’ll carry out those tasks.
- Develop a plan for training them to perform the tasks, as well as a system for communicating and monitoring work.

The upcoming sections cover how to identify tasks, how to create processes for the tasks, and how to communicate with and manage your virtual team members.

## ***Hire a Virtual Assistant When You Need to Add Skills***

This reason for hiring a VA is often overlooked. If you do the 'stop doing' activities and separate your genius tasks from everything else, these tasks will likely end up on your stop doing list. However, some tasks could fall into a gray area, where they are important to your bottom line, you like doing them, and you're good at them, but they'd be better executed by someone else. Here are two scenarios where you may want to hire a virtual assistant - or someone else - to help you fill some gaps in your skills.

### *You Need Complementary Skills*

As you go through this process of separating your genius and stop doing tasks, you may uncover areas where you need to find someone who's better at it than you are. For example, maybe you have "scheduling social media content" on your stop doing list - which is a great one for and easy to hand off to a VA. But when you think about it a little further, you realize you're good at coming up with content ideas, but you're either not great writing them or you simply hate writing. Therefore, you decide that "creating social media content" also goes on your stop doing list.

Then, when it comes time to find your ideal virtual assistant, you'll search for a content management or social media VA with some writing chops. Writing social posts becomes one more task you eliminate from your to-do list, and the content improves at the same time!

### *You're Better at Vision and Strategy than Task Execution*

For many business owners, especially those in more creative industries, coming up with ideas is easy but breaking down and following through on those ideas is difficult. Often, the entrepreneur is an entrepreneur because of their visionary nature. They can see the big picture and how to reach their goals strategically, but they struggle with creating the day-to-day tactics needed to execute the vision.

Although a visionary entrepreneur may also hire an online business/chapter manager or an integrator (both of which were described in the "What is a Virtual Assistant" section) to help them create and execute their business systems, a virtual assistant can also help. VAs are taskmasters! When you hand off all your routine, repeatable tasks to a virtual assistant, it keeps your business moving forward and frees you up to invest more in your strategic vision.

## ***Hire a Virtual Assistant as an Investment in Your Business***

We hope by now you can see that hiring a virtual assistant pays you dividends because it allows you to spend more time in your genius zone – and your genius zone is your money-making zone. But the idea of spending money on a VA – versus “saving” money by continuing to do everything yourself – trips up a lot of business owners, so we want to spend more time on it.

Businesses stall out when the owner is being pulled in a million directions, trying to learn and do everything in the business. But entrepreneurs with businesses that are growing quickly and consistently know that building a team around them means they’re buying back the time they need to perform the activities that grow the business. By leveraging someone else’s skills, you give yourself the time you need to focus on what’s most important in your business.

### *An Everyday Example*

Would you rather change the oil in your car yourself or spend \$30-50 at the service station where they’ll take care of it in roughly 20 minutes? Most people take their cars to the service station, even though changing your oil is something car owners could do themselves for less money. Why is that?

Well, for one, it’s likely to take you up to twice as long to do it yourself – and that’s not counting the time it will take you to learn the process the first time you do it.

Plus, you still have to run out to the auto supply store to purchase the oil and a filter, as well as properly dispose of the old oil. Finally, unless cars are your thing, you’re probably just not interested in learning car maintenance, or maybe you just hate to get dirty or greasy. Therefore, the time and energy you save by going to the auto shop is worth the cost of the professional oil change.

The time and energy you’re going to save by investing in a virtual assistant is also well worth the investment. But you don’t have to go on our word for it, as you’ve created a means to measure your investment.

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# What to Do Before Hiring A Virtual Assistant

## ***Determine What to Delegate to the Virtual Assistant***

It seems obvious that business owners would want to know what they'll have a VA to do - what they'll be paying the VA for - before they bring someone aboard. However, it's common for business owners to find themselves in such desperate need of help that they fail to "look before they leap." Many hire a VA before they have clarity around the tasks the VA will perform, which ends up in disaster for both parties. Here's how to avoid that trap.

## ***Conduct a Time Audit***

It seems obvious that business owners would want to know what they'll have a VA to do - what they'll be paying the VA for - before they bring someone aboard. However, it's common for business owners to find themselves in such desperate need of help that they fail to "look before they leap." Many hire a VA before they have clarity around the tasks the VA will perform, which ends up in disaster for both parties. Here's how to avoid that trap.

Take a look back at the *When to Hire a Virtual Assistant* section for more detail about a 2-week time audit for taking a look at everything you are doing in your business and identifying what you need to stop doing - and delegate to an automation or team member - to move your business forward.

How you document your activities is up to you. You could simply jot down in your calendar what you're doing throughout the day, create a spreadsheet, or even just keep a separate notebook handy. Setting some reminders for yourself throughout the day to ensure you're tracking activities is probably a good idea. Most business owners tend to get wrapped up in what they're doing, so it's all too easy to forget to record your tasks until it's too late to remember the details. Time tracking apps like RescueTime and other time tracking extensions can also help you to paint an accurate picture of where your time is going.



Chris Ducker also suggests an activity you might want to try. You create “3 lists to freedom” to help you figure out how best to outsource activities. Listing activities you hate to do, tasks you struggle with (i.e., you don’t have the skills), and anything you don’t think you should be doing helps you discern what to delegate and the skills you need in a virtual assistant.

### ***Divide Your Tasks***

Next, once you have your two-weeks’ worth of observations, review what you’ve recorded. Try grouping and tallying your time by type of task. First, drop them into categories like admin, sales, marketing, and operations. Next, take a look at where you’re spending your time and ask which tasks are and are not the best use of your time.

What you’re aiming for is separate the tasks that fall into your (or your existing team member’s) “sweet spot” or “genius tasks” – those things that you’re great at and that you love to do – from everything else. Your sweet spot tasks are the more strategic activities – those that make you money and otherwise move your business forward. Sweet spot activities are the ones that must be done by you. They are likely the tasks closely related to why you created your business in the first place.

### ***Determine which tasks to delegate***

Obviously, you’re not handing off your sweet spot tasks, so now you’ll look at everything else and determine what can be done by someone else. The simplest things to hand over to a virtual assistant are all the routine, repetitive tasks that need to be done but take up a lot of time yet don’t add a ton of value. However, you don’t have to limit yourself to simple, daily and weekly tasks. Just look for anything that – with proper direction – someone other than you could do.

Finally, take all the items and sort them into lists of daily, weekly, monthly, and quarterly tasks. Focus on getting the list of daily, repeatable tasks nailed down first. Trust us! Once you hire your VA, plan to use this list as the first items you assign to him or her. For one, it will take a bunch of low-level tasks off your daily to-do list, freeing up a ton of time and energy. Also, those daily, repeatable tasks will be among the easiest ones your virtual assistant to learn quickly. When your VA starts, the two of you will be able to hit the ground running!

### ***Consider Whether Specialist Skills Are Needed***

When you go through your lists, you are likely going to identify simple, repeatable tasks that are perfect for delegating to a generalist virtual assistant. However, you may also find that some tasks on your “stop doing” list require more specialist skills. For example, if you have

been updating your website because, although it's something you can do, it's an activity you hate doing and aren't highly skilled at, you are going to either need to outsource your website work to a specialist virtual assistant or to a web designer, depending upon the complexity of the updates your site requires.

Don't fall into the trap of the "super VA" myth mentioned above. Be realistic about what you can assign to a VA and what is going to require special skills from another team member or contractor. The question of whether you need a VA and/or to fill a different role is a topic that's been addressed on The Virtual Success Show in greater detail.

### ***Create Processes and Standard Operating Procedures (SOPs)***

Once you know what you'll have your virtual assistant do, you need to establish how they're going to do it. That is, you need to establish process clarity.

Process clarity ensures clear expectations are set - that everyone on the team understands the desired outcome of a given task, the steps required to perform it effectively, and who is responsible for what. To achieve process clarity with your virtual assistant (and other team members), we recommend focusing on three elements: process mapping, process efficiency and effectiveness, and process ownership. If that sounds like a bit much, we promise that getting to process clarity will pay huge dividends for your business in the long run. So, the effort you put into getting this right now will be well worth it. Plus, we're about to explain to you exactly how to do it!

#### *Process Mapping*

First off, let's talk about why process mapping is incredibly important for your business in general - and not just in relation to hiring a virtual assistant. For starters, you cannot grow a great business without solid systems. You can create a good business without systems and probably earn a nice income. But a great business is one that works for you and not vice versa.

Also, without solid, repeatable processes, you will find it virtually impossible - and honestly exhausting and totally overwhelming - to take your business to the next level. "Leveling up" your business requires sound systems and processes that are working for you, plus a good team to manage them. But the systems and processes must come before the team, and process mapping is the first key to developing effective processes.

## *How to Map Your Processes*

Okay, so we hope we've convinced you that investing the time to gain process clarity is critical and you're ready to jump in and get started. Now, this might seem a bit dull and tedious but trust us - it pays huge, long-term dividends.

### *Clarify Why You Have These Processes*

To get started, we first ask a question that might sound silly at first glance: "Why are we actually doing this process?" But you really have to ask this question at the beginning of this whole step.

Next, take a look at the tasks you laid out in when you completed your time audit and identified the tasks you'll be handing off. For each, quickly jot down why you're actually performing that task for your business. Here are some additional prompts to help you really drill down into that why:

- Why are we doing this task?
- What is the purpose of this task?
- Why are we even bothering with this task?

And what you're really looking for here is what is the result that you're looking for. Clarify:

- Why this task is important to my business?
- What is the outcome that we want to achieve from this task?
- What's the objective?
- What results do we expect from this task?

Once you're clear on the why and the outcome, the next two questions become:

- Do we already have a process?
- Is this process actually inside my head?

We bet you're going to be a bit surprised that most of the time, there is a process but it only exists in your head. Often, business owners don't even realize they have a process, because they've never thought about it. However, you probably have a way that you do things - steps in a process and standards for the outcome. And if you don't have a standard process and criteria for the outcome of some or your tasks, let's fix that now.

### *Identify the Steps in the Process*

For each task, you'll document the process, step by step. Now, this next point can't be emphasized enough. You have to be unbelievably, super-granular here, capturing more details than you think you need. No matter how obvious a step may appear to be, write it down. Break it down into the smallest elements you can. This super-detailed documentation is needed to ensure your process could be handed to anyone who doesn't know you and doesn't know your business, yet they could execute the task based on the details in the steps.

That is the definition of a great process and having a great process allows you to hand it to someone. A super-clear, step-by-step task can be delegated. You hand it off to someone else, and you don't have to worry about it! When you're able to hand a process off to your virtual assistant, know that they'll be able to follow the steps, stop thinking about it - because you know it will be handled - that is the foolproof, stress-free place you want to be in your business.

Don't misunderstand. Problems will occur, especially in the beginning. We'll talk about dealing with problems and mistakes later and explain how we view those problems that come up as a gift, rather than anything else. For now, know that following the steps in the process usually works. And when they don't, it's a signal.

### *Document the Process Steps*

Now that you've identified the steps, you need to document the process using clear, simple language. Start by giving a description of the process, the explanation of why you do it, and then lay out how you do it.

To help keep it simple, clear, and direct, use bullet points and completely avoid big, long-winded paragraphs. Use simple, to-the-point, very granular, detailed bullet points. To clarify what we mean by detailed, we don't mean long, detail-filled bullet points, we mean lots of bullet points. Add a bullet point for each individual mini step within the process. Create as many as you need to communicate every step clearly.

### *Clarify Who Is Responsible for the Process*

This next step in process mapping seems obvious, but it's critical to be clear about who is responsible for this process. Again, this might seem so obvious, but we often see business owners create problems for themselves because of lack of clarity here. For example, imagine you're going to be out of the office for a while and you email two members of your team to tell them what to do while you're gone. You send something along the lines of, "I would like to

do X, Y and Z on social media while I'm away. If you could take care of that that would be great."

What's the problem? There's no clear line to indicate which individual was leading on that, which was going to step in and actually perform the tasks and so on. In situations like that, you fall into the trap where each person thinks the other is handling things, and then no one is! Therefore, you must be very clear, who is responsible for this task. Is it you, or is it the VA, or is it somebody else?

### *Additional Process Mapping Decisions*

How often do we do the task? Is it daily, weekly, monthly? Specify it. If you want something to be done every single week without fail, non-negotiable, no excuses, then put it into your recurring tasks list to repeat weekly.

How quickly do we do the task? Be very clear on turnaround times and due dates. If it happens weekly and needs to be completed by end-of-day each Wednesday, spell that out. At the same time, make sure you are fully aware of how long things take, especially those that are outside of your expertise!

What tools and resources are used for this process? You may have opportunities to allow our virtual assistant to identify where there's a better tool for them to use. But for now, when you have the tools and resources that you like to use, spell it out in your process.

What are the standards for the process? That is, how does the VA know when it's a good job? Another caveat here. Often business owners have a standard that only exists in their heads and they don't realize this. Then, when they get a task back that looks substandard for them, they get very upset. But you need to communicate what is success for you and what is a job well done for you. Describe exactly what that looks like. This is also something you should discuss with your VAs - that they also need to ask and verify with you what success looks like, but we'll talk more about that in the section on communicating with your virtual assistant.

### *Process Efficiency and Effectiveness*

We want you to design your processes to be as efficient and effective as possible. Because if you give an inefficient or an ineffective process to somebody else, you're basically throwing your money away. You'll pay someone to do it, but you haven't set them up to do it successfully. You don't want to pay a virtual assistant to perform a task incorrectly or inefficiently, right?

What's more, we often find that the business owner is likely to blame the VA when it doesn't go right. Then people feel blamed for things outside of their control and everyone gets upset. Yet what's actually going wrong is the process - the process itself is the problem.

So, to reiterate from above, your process must be something where anyone could come in, pick it up, follow the correct steps, and succeed. If this can't be done, you need to examine the process itself for problems.

Performing this troubleshooting is critical and you need to do it and to do now. For example, some processes really rely heavily on your experience or your judgment and your opinion because you've been doing it yourself. It sometimes can be unclear for somebody new coming in, so make sure you consider all of your thought processes that go into a task, and not just the visible steps.

### *Process Ownership*

Now we're moving on to step three in process clarity, which is the ownership of the process. You have likely noticed that the bulk of this section has very little to do with the virtual assistant you intend to add to your team. This section has been all to do with you, your business, and the processes for the things you're doing. And why is that? Because this is your business and you have to control the processes for how things are done. Your virtual assistant may arrive thoroughly trained in digital marketing, social media concepts, or whatever it is you're looking for. However, content, context, look and feel, process outcomes, and the strategy the tasks derive from are all your job in your business.

That is, you want your voice and your stamp on everything that comes through your business...from emails to clients, right through to how the phone is answered, to how a social media post gets pushed out, and the types of pictures that represent your brand, and everything else. Those are all your unique stamp, which you need to have on all those things. Therefore, you are responsible for creating and documenting the processes that will lead to success for you, your virtual assistant (and other team members), and your business.

In the upcoming section on managing virtual assistants, we dig deep into rules and best practices for delegation and process ownership and oversight in greater detail. For now, just know that, as the business owner, you must take ownership of your processes, and in the sections to come, we will tell you how to do that effectively.

## **Select a Project Management Tool**

It's highly recommended that you select a project management system before you bring your virtual assistant on board. Choosing the right project management software will be critical to your success, as it's the best means for delegating and managing your team's work.

### *What is a Project Management Tool?*

A project management tool allows you and your team to organize work and manage tasks and projects. Typically, project management tools include the ability to plan, schedule, and delegate work. They also allow you to communicate and collaborate with others, document progress, and track and evaluate productivity.

Within a project management system, you create projects, composed of tasks and subtasks. Individual projects or tasks can include templates, checklists, and other resources, such as documents, spreadsheets, and links to relevant websites. Tasks are assigned to team members and given due dates, so that everyone knows who is responsible for what and when it's to be completed.

### *Why You Need a Project Management Tool To Manage Your Virtual Assistant*

The number one benefit of using a project management tool to manage your work is keeping all of your communications in one place, preventing email from holding your team back. We've found - and we're sure you'll agree - that our email inboxes are getting clogged up more and more every day, which becomes a bit of a headache.

And when you're trying to manage a team, it's all too easy for a team member to say, "I didn't see that email," "I didn't see that response," or "I lost that email." When there are too many emails going back and forth, it's too hard to find instructions.

When you use a project management tool, you basically set up all your tasks and projects within the system, and then every communication is attached to a specific task. Therefore, it's much easier for you to know the tasks are being done, that communications have been read, and that the steps are available within the project management tool. So not only is everything in ONE place, each communication and everything that's needed to perform a task is attached to that task within the project management tool.

## *How to Choose a Project Management Tool*

At the Virtual Hub, we love Asana for project management, so that's one that you may want to try out. Plus, it's free! It does have a paid, professional version, but it's likely the free version includes everything you need.

It doesn't matter which tool you select; you just need to find one and select the one that works for you and your business. If you're not already using a project management tool, you may want to try out a few and see which one you like. For example, if you're more visual, you might like Trello, where projects are set up as kanban boards. Other tools, including Asana, give you the option to view projects as kanban boards or as lists.

But pick a tool and learn how to use it. Configure its settings (e.g., notifications, color coding) to your preferences. Make sure you really learn its ins and outs because you'll be training your virtual assistant to use it to complete his or her tasks.

## *Popular Project Management Tools*

A quick internet search will provide you with curated lists of the best project management tools, along with user reviews. But here are a few of the most popular online tools for project management for entrepreneurs.

- Asana
- Trello
- Teamwork
- Basecamp
- Clickup
- Airtable

## *How to Get Started with Your Project Management Tool*

Once you've selected your tool, begin adding the processes you created based on the process mapping formula above. Add all your projects and task lists into the tool, both those you'll continue to be responsible and those you'll delegate to your virtual assistant.

In the upcoming section about how to manage your virtual assistant, we'll share some recommendations around which task lists to create first, as well as the details to include in your project management system.



### *Set Up Accounts For Your Virtual Assistant*

Before your virtual assistant's first day, be sure to set up any accounts they will need in order to complete their work. You don't want them to be held up, waiting for you to create an account for them, once you have them on board. Plus, providing your virtual assistant with all the electronic tools they're going to need on day one will let them know you prepared and you're excited to have them join your team.

For example, if they will be emailing your clients, they'll need a company email, so be sure to set that up, along with login credentials they'll need for any of your other internal systems.

### *Establish Security Systems*

For some of the tools and accounts your virtual assistant will be using, you may not want to give them "the keys to the kingdom" with full access to sensitive data and you want to be able to revoke their access if and when they leave your employment. Security tools such as LastPass allow you grant access to your accounts without providing your VA with your password. Then, if you want to take away their access, you simply remove their permission within the LastPass app.

In other cases, you will want to take a look at access options within the digital tools your virtual assistant will be using. For example, Facebook allows you to choose from different roles when you grant your VA access to your Facebook page, where each role includes the actions that can and cannot be taken by someone assigned to that role.

If you'd like additional ideas about options for securing your accounts to protect your business, the topic is covered in detail on The Virtual Hub blog.

### *Finalize What You Will Look for in Your Virtual Assistant*

Review all the activities you completed from the above recommendations and make your final decisions. Do you need a generalist or a specialist - or both? What's your budget? Are you looking for a full-time or part-time role or roles? Gaining clarity on the exact role or roles you need to fill will help you with the next step, which is recruiting and hiring the team member you need.

# How to Hire a Virtual Assistant

When it comes time to actually begin searching and selecting your virtual assistant – or assistants! – you have a variety of options for finding the right person for your business. Some routes will be more labor-intensive than others, but you do have to put in some work to make sure you come up with a match made in heaven, no matter which option you decide on.

We know you will have already planned ahead and determined what tasks you'll hand off to your VA, and you will have mapped the processes for those tasks. From that information, you'll need to develop an accurate job description for the VA who will be a fit for your business. You'll also want to consider some additional factors, including:

- Do you need to hire a full-time or part-time virtual assistant?
- Are you searching for a generalist or specialist?
- Do you prefer someone in the same time zone as you?
- Does your virtual assistant need to be a native language speaker or be well-versed in your native culture?
- Do you want to hire a freelancer or go through an agency?

Let's help wade through the choices you need to make!

## ***Should I Hire an Offshore or an Onshore Virtual Assistant?***

The “virtual” part of virtual assistant means that you can find your VA anywhere in the world! So, let's begin your quest for the perfect virtual assistant by helping you determine whether to look for an onshore or an offshore VA. For the sake of clarity, let's take a brief look at what those terms mean.

“Onshore” describes individuals (companies, as well) that work domestically, whereas “offshore” refers to resources in a foreign country, typically one that is not neighboring your home country. There are benefits and drawbacks to hiring each type of VA, so we want to offer the following guidelines as you make your decision.

### *When an Offshore Virtual Assistant Is the Smart Choice*

In choosing between onshore and offshore virtual assistants, there's no “right” answer, but there are some factors for figuring out which is right for you and your business. Here are just a few of the situations where an offshore VA is likely the better option.

### *Your Budget is Limited*

The primary advantage offshore VAs offer is cost savings. Virtual assistants in countries like the Philippines and India, working at rates from about \$10-15 an hour, produce work that's on par with Western VAs charging \$25-50 per hour.

Because of the 60-70% cost savings, hiring an offshore virtual assistant means you can either save some money or you can maximize your budget by hiring the VA for more hours than you could afford with a domestic VA. You may find that hiring a full-time, offshore VA costs roughly what you'd pay a part-time, onshore VA. Having full-time means you can hand off more tasks and maximize your time in your genius zone.

Plus, the lower rate allows some entrepreneurs to hire their first (or next!) VA sooner than if they had to wait until they could afford an onshore option. Once again, this results in the business owner's ability to grow their business and grow it faster.

### *You Want to Get Necessary but Low-Impact Tasks Off Your Plate*

Offshore VAs are typically great generalists who handle a wide range of general admin tasks, including email management, appointment scheduling, creating documents, and transcription. However, they often also possess skills to take on a variety of simple, repeatable tasks you might associate more with a "specialist" VA role. Social media and content management, digital media, and systems tasks are among those tasks offshore VAs handle with ease. If you're interested in ideas for recurring tasks for virtual assistants, we've detailed a variety of simple, repeatable tasks both general and specialist VAs on our blog.

### *You'd Enjoy Waking Up to Completed Tasks*

Although you can hire an offshore VA who works during your working hours, there are benefits to having someone working for your business when you are not. For example, if it would excite you to open your inbox in the morning and see that business emails have been handled and unnecessary ones have been deleted, leaving you with only those emails that require your attention, then hiring an offshore VA could be for you!

Plus, with an offshore VA on your team, you may be able to expand your customer service hours. Your new virtual assistant could be addressing client issues on the phone or email, allowing you to provide a higher level of customer service - all while you're sleeping!

### *When an Onshore Virtual Assistant Is the Way to Go*

The benefits of hiring an offshore VA are pretty compelling, but there are situations where it's important to work with an onshore VA for your business. Let's now take a look at the conditions that warrant an onshore virtual assistant.

#### *Your Tasks Require a Native Language Speaker*

If you plan to have your VA speak to your customers on the phone - or even correspond with them via email - hiring a native English speaking is probably the wise choice. Although many offshore VAs speak superb English, you can rest assured that a language barrier won't interfere with the level of service your business provides. Similarly, if writing or editing blog and social media posts or podcast editing are among the tasks you wish to delegate, an onshore virtual assistant is the safest bet.

#### *Your Tasks Require a VA of the Same Culture*

Not unlike the language issue, a thorough understanding of your native culture could be a requirement of your business. If that's the case, an onshore virtual assistant is right for your business. Think about whether the tasks you want to delegate may require your VA to completely understand cultural references and nuances. For example, if you're hoping to hire a virtual assistant to help manage members and their engagement in your Facebook group, it might be important that you select someone who will "get" every cultural reference made by the members.

#### *You Need Someone in the Same Time Zone*

As we already stated, many offshore VAs will complete their tasks during your working hours, even if they're a dozen time zones away from you. However, it may be simpler and easier to find someone who's geographically close to you if working "together" is your preference. If you'd like to collaborate with your VA in real-time, or you looking for someone who can help you with tasks that pop up and need to be completed "right now," an onshore virtual assistant will be a better solution for you.

### *You're Hoping for Some Strategic Thinking and Decision Making*

We want to be very clear on this point. In this case, "strategic thinking" doesn't mean involving your virtual assistant in the strategy of your business. The strategy belongs to the business owner completely. We're merely referring to the ability to see things and make judgment calls beyond the step-by-step tasks at hand.

You're obviously going to take our advice and create your VA's task list, along with detailed processes and instructions, before you hire the virtual assistant. To help you decide whether you're going to search for an onshore or offshore team member, go through tasks and their steps and decide if they can be performed by anyone with the tools and instructions. If one or more of the tasks may involve making some type of judgment call - even if the decisions to be made are simple - or the ability to think on one's feet, the onshore VA is the wise choice.

### *When an Onshore and an Offshore VA Is the Perfect Pairing*

At the risk of muddying the waters, we want to propose that your best option might be one (or more!) of each. To help clarify, let's think again about why you're hiring a virtual assistant in the first place. You can't do it all, so you're hiring a VA (or two!) save you from doing low-impact tasks and to work with more focus. The combination of onshore and offshore VAs might be the best way to get to that goal.

### *Your Requirements Vary*

Once you've identified the tasks you want to take off your plate (or a team members' plate!), your list will include everything you shouldn't be doing. Specifically, repeatable, low-impact tasks, tasks you're not good at, and any activities you simply hate doing should be on that list. That final list probably involves a wide range of tasks and skills.

For starters, it's going to be harder to find one VA who can fill your needs, whether you're recruiting from an offshore or an onshore pool of candidates. In addition, many tasks ought to be general administrative or other recurring tasks, but some will require decision making or specialized skills.

If you hire only an offshore VA, they may struggle with the higher-impact tasks and then end up back on your plate. Alternatively, you might waste time and money because they have to repeat work to fix errors - or you have to fix their errors yourself.

At the same time, if you hire a single onshore VA, one who's capable of the challenging tasks, you'll be overpaying them for the time they spend on the simpler, repeatable tasks. Not to mention, they'll probably hate doing tasks for which they are also overqualified. When you

need someone to save you from doing low-impact tasks, don't delegate them to someone else who would find them to be low-impact!

### *Why Go with Both*

The smarter alternative to one, full-time VA – and the option which will maximize both budget and the impact on the business – is to add two, part-time virtual assistants. Hire one onshore and one offshore. Assign the simple, step-by-step tasks to the offshore VA and the complex or specialist ones to the onshore VA. You'll get full-time help but in a more cost-effective way.

That's just one solution. Because offshore is so cost-efficient, you might be able to go with a full-time, offshore VA and also hire a part-time, onshore VA. Whatever suits your budget and your business needs! You have lots of choices, so be strategic about how you allocate your investment and leverage others' abilities to grow your business.

### ***Am I Looking for a Full-Time or Part-Time Virtual Assistant?***

Based on your list of tasks and the types of tasks on the list you created for your future virtual assistant, determine whether part-time or full-time assistance is going to work for the tasks required and your budget. Keep in mind that it will take your VA more time to complete tasks than if you completed them yourself – at least at first.

We recommend that you hire a VA on at least a half-time basis and encourage business owners to consider hiring a full-time virtual assistant. If you hire someone for fewer than 20 hours a week, that individual will need at least two or three other clients to keep them afloat. The more your VA's attention is divided among several clients, the more likely you are to receive lower-quality work. Also, in this scenario, you run the risk of losing your VA completely when one of their other clients realizes the impact on their business and asks the VA to join their team on a full-time basis.

### *Why We Recommend a Full-Time Virtual Assistant*

The reasoning above helps to explain why we suggest hiring a full-time virtual assistant from the outset. At first, you might feel that you can't justify the budget for a full-time VA or that you won't have enough work to hand off to keep the VA busy for 40 hours a week. That's only because you haven't yet experienced what a virtual assistant can do for you, your business, and your own productivity! And when it comes to the budget, remember: Hiring a VA is not an expense, it's an investment in your business that will pay you dividends!

We see it all the time where business owners start with a part-time VA, only to realize how quickly their business can have a growth spurt because their part-time VA allowed them to spend more time on their genius tasks. For one, they start getting used to having more genius time and it becomes a bit “addicting” – they want even more. In addition, their focus on genius tasks leads to more business growth, so they find they need even more help to keep up.

If you’re in luck and you come to this realization before the VA’s other client(s) do, you may be able to transition your VA from part to full-time. On the other hand, the potential is there one of the VA’s other clients to beat you to the punch and offer your VA full-time work. And where does that leave you? In search of a VA. Again. And just when things were really starting to groove in your business.

So, when you’re deciding whether to bring on a part- or full-time virtual assistant, keep in mind that a VA, who needs to earn a full-time income, is not going to work for you part-time until you’re ready for more. Therefore, when you are ready for full-time help, you may be competing with others for your VA’s time. At which point, you could lose your VA completely to another of his or her clients, or you may have to hire a second, part-time VA to cover the tasks you want to hand off. If you’re okay with eventually having two part-time team members to fill your full-time requirements, starting off with a part-time VA is less risky.

### *Do I Go with a Freelancer or Hire Through an Agency?*

A freelance virtual assistant is an independent contractor with whom you’d hire and work with directly. They work solo, from their own home or office, using their own equipment. A benefit of going with a freelancer is the ability to interview and vet them directly – which may also be a drawback.

As far as agencies, there are a few different types of structures to these services, and we’ll describe them below. But in general, they help to match you up with the right virtual assistant, taking some of the recruiting work off of your plate.

### *Finding a Freelancer*

Freelancers can be found through referrals from your network, as well as on platforms such as Upwork and Freelancer. These are online platforms where both freelancers and business owners create profiles and search for their needs. The upside is that there are thousands of people, including VAs, who are looking for work on these platforms, which means you have a vast talent pool to tap into. The downside is also the large number of candidates – you’re

likely to get hundreds of responses to the job description you post. Wading through all of the interested applicants can be overwhelming and time-consuming.

Freelancers are potentially more cost-effective than hiring through an agency because you're not paying a premium for an agency to recruit or train them. However, the relative cost-effectiveness depends upon other factors, including whether the freelancer or agency is onshore or offshore.

### *Sourcing Through an Agency*

As far as agencies go, you have options around how much initial and ongoing support you'll get from working with the company. Consider types of VA companies below. Later, we'll dive deeper into the pros and cons of working with the various models.

#### *Recruiting Agency*

These companies recruit virtual assistants and help match you with the right one. Typically, they provide you with a few VAs to interview, you make a selection, and you pay the agency a one-time fee for doing that legwork for you. After you are matched with your VA, your relationship with the agency is complete. They provide no further assistance. If your VA quits or otherwise doesn't work out, there's no backup or replacement. You'd have to begin the process anew to replace your VA.

#### *Virtual Assistant Company*

Under this model, the company hires the VAs and, when you hire the company, you have immediate access to their entire pool of VAs of various skills and backgrounds. The company assigns the work you need to be completed to a VA with the right skills. You may or may not even communicate directly with the VA or VAs who are working on your tasks. Often, your point of contact is a project manager who's determining which VA is doing what for their clients. Because a variety of VAs may have their hands in your work, there's little to no risk of work stoppage because someone quit. The company simply taps into the other VAs in their talent pool to ensure your tasks are completed.

#### *Virtual Assistant Managed Services Company*

Managed services companies also do the recruiting, interviewing, testing, and hiring. The difference here is the agency will match you with candidates to interview, and you select one to become your dedicated virtual assistant. The VA becomes an employee of the managed



services company, which provides the VA with office space and equipment, handles HR (e.g., they can intervene if problems arise) and payroll, as well as KPI management. You then communicate and work directly with that virtual assistant, which gives the person in that role the opportunity to learn your style and preferences and consistently produce work to your standards. However, the services company does not provide any training for the VA, so your onboarding and training process may take a bit of time.

### *Premium, Full-Stack Virtual Assistant Company*

Premium VA companies also do the recruiting, interviewing, testing and hiring, and match you with a dedicated virtual assistant with the experience and skills you require, plus an additional layer of training and testing services.

For example, the full-stack agency trains their virtual assistants on a wide variety of commonly used software and tools, which can expedite your onboarding and training process. Often, VAs from such an agency already possess 50-70% of the knowledge and skills they need to slide right into their role on your team, which reduces the amount of time you'll need to invest in training.

Basically, VAs from a premium company will likely join your team already familiar with many of the tools and processes you'll want them to learn. Then the training you provide becomes more focused on teaching your VA about your preferences and way of doing things within those tools and processes. Further, agencies not only also intervene when problems occur, but they are also typically willing to add to their training programs to help you fill in a gap in your VA's knowledge. Finally, because they have a pool of VAs, the agency can help you replace - or add! - a VA, and even provide coverage for when your dedicated VA is ill or on vacation.

What's more, your onboarding process will likely go more smoothly and rapidly because premium agencies are steeped in process development and management and will even offer you training and assistance in onboarding your virtual assistant! For example, at The Virtual Hub, we offer high-level training to our clients, as well as to our VAs, and deliver it through a dedicated, online member site.

Finally, premium virtual assistant companies offer far more comprehensive testing and training. For example, although nearly everyone in the Philippines speaks English, some are more proficient than others, and premium companies test for English proficiency before adding a VA to their pool. In addition, business owners can be more confident about security issues in their business when they choose a premium VA company, as premium services include background and medical testing as requirements for hiring and placing a virtual assistant.

### *Additional Outsourcing Options*

There are a few other options for outsourcing work you want to get off your plate. The services below offer the ability to offload entire functions of your business. These fall a bit beyond the scope of our topic of virtual assistants, but they are worth mentioning so that you're familiar with all of your available avenues.

#### *Specialist Services Company*

If you discovered that the tasks you want to hand off primarily fall within a single business function, you may decide you need truly specialist skills - skills that are even beyond what a specialist virtual assistant could offer. In a case like that, you can outsource the work to an agency focused specifically on that area of expertise.

For example, if your business requires a lot of photo editing and graphic design, Design Pickle will match you with a designated professional designer who will create everything you need for a fixed monthly fee. Similarly, Rocket Lawyer and Bean Ninjas offer specialist services in legal matters and bookkeeping, respectively.

Because these companies offer truly specialist services, working with them may come at a higher cost. However, if what they offer aligns perfectly with what you need, it may be well worth the extra cash. For the design example, you could possibly save money by paying a monthly fee for unlimited graphics instead of paying a freelancer by the hour or by the piece.

#### *Full Business Process Outsourcing (BPO)*

Taking it one step further, there are companies, such as TaskUs, Support Ninja, and Accenture, business owners can hire to completely take over an entire department or function. Commonly outsourced functions include customer service, human resources, and procurement.

Business process outsourcing is an option when there is work that can be done more expertly or more cost-effectively by a third party that specializes in that service area. Rather than having to "reinvent the wheel" and become experts in an area beyond the main focus of their business, owners can simply hand those functions off to others who are already experts in the field. BPO is frequently used by big companies such as Uber, Amazon, and Verizon, but it can be a viable option for smaller businesses, as well.

## *Working with Both a Freelancer and a VA Company*

Similar to how you might go with a combo of an onshore and an offshore virtual assistant to perfectly fill your needs, you might want to consider working with both a freelancer and through an agency, rather than making an either-or choice. For your more specialized tasks, it might be easier to find a freelancer who is the right fit for your specific needs, but, for more administrative tasks, it's likely simpler and more affordable to hire a generalist VA through a company or agency.

## *The Investment for Each*

First of all, please notice that we chose the word "investment" over "cost" because hiring a virtual assistant is truly an investment in your business which will pay you huge dividends over time. But our budgets are always a factor, so we want to address that, as well.

There is no clear-cut answer in terms of which option will be the most budget savvy. In theory, agencies are pricier because you pay the recruiter, company, or agency for the support they provide on top of paying the VA's pay rate, whereas you avoid the middle man by paying freelancers directly. All other things being equal (e.g., hiring from the same market; considering candidates with similar experience and skills), a freelancer is usually going to be more affordable.

However, you can save significantly by choosing to look for an offshore virtual assistant, whether you go with a freelancer or an agency. The win-win combination of a VA from an offshore agency is that you will pay less for the same quality work a domestic VA would produce, and you have the support from the agency for training, coaching through issues, covering vacation and sick time, and options for replacement, if needed.

## *Recruiting and Selecting*

At this point, you'll be figuring out which virtual assistant companies you want to reach out to and/or where you want to post your job online to attract the right freelancers. The rest of the selection process will be roughly the same whether you go through a third party or recruit on your own. You'll need a detailed description of the VA role in your organization, to find candidates to evaluate and interview, and to make a final decision about whom to bring on board. The primary difference will be reviewing applications yourself or having another company do that piece for you.

## *Creating a Job Description*

Whether you're thinking onshore or offshore, or you hope to find a freelancer or go through an agency, you will need to create a job description for the role you're hoping to fill - although an agency will often assist you with this part, as well. Here's where the hard work you put into identifying tasks, documenting processes, and selecting a project management tool is going to pay off!

The job description you create must be highly detailed, both in terms of what your virtual assistant will do, as well as what they will not do. At the same time, it must be realistic in terms of the qualifications you list, as well as easy to read and understand. Make sure you keep the description to 500-600 words and use headings and white space because applicants are likely to scan the post. This article from *The Undercover Recruiter* provides excellent - and research-backed - tips for developing a great job posting.

## *Choosing and Assessing Candidates*

If you work with a virtual assistant company, they will send you a few of their candidates that best fit your description for you to interview. But if you decide to go the freelancer route, you'll have the additional step of wading through all of the applicants to decide who fits your description. Keep in mind that the number of applications you receive could number anywhere from a few dozen to hundreds.

Once you know whom you're going to interview, be sure to educate yourself on how to conduct them effectively. Recruiting is a specialized skill, so unless you have a background in HR, don't just "wing it;" study up on interviewing techniques. Here are a few professional resources to get you started:

- [How to Conduct an Effective Job Interview](#), by The Harvard Business Review
- [How to Conduct a Job interview](#), by Inc. Magazine
- [Interview Questions](#), by the Society for Human Resources Management

In addition to the interviews, you will want to verify the candidates' skills and abilities in other ways. For example, if you're recruiting from overseas, you may want to require an English test. VA companies will - or should - do this for you, and many of the job boards, such as Indeed, have testing options available. Finally, you'll want to check references and either ask for work samples or have the candidates complete a few small tasks to demonstrate their competency.

Finally, beyond the candidates' work credentials, you'll want to take into account the types of personal characteristics you're looking for. Take some time to get clarity on the type of person you want to be performing your tasks and to work with every day. Some HR professionals and

VA agencies might tell you to look for someone with a lot in common with you – that opposites do not attract. We disagree with that perspective, at least in part.

Yes, you will want your virtual assistant to have similar work-related values. Nevertheless, someone “just like you” will have a more entrepreneurial, more visionary mindset, whereas you need someone who’s naturally more structured, focused, and detail-oriented. You do want to look for someone who has initiative and can think for themselves, but you’re looking for someone who will manage tasks and processes, not strategy or ideas. You need someone who can execute your strategy and tactics. [ss podcast](#).

We don’t mean to toot our own horn, but as we are in the business of recruiting and hiring virtual assistants, we have developed a really solid selection process for The Virtual Hub. So if you’d like to hear us break it down, in-depth, tune in to the “How to Successfully Recruit the Right VA” episode of The Virtual Success podcast.

### ***Wrapping Up: Which Source of a Virtual Assistant Is Best for You?***

Our goal was to lay out pretty much everything you need to know in order to hire a virtual assistant. If it seems overwhelming, take a deep breath and go through the decisions you need to make one at a time.

- Are you looking for an onshore or offshore virtual assistant? Or a combination of two?
- Do you plan to hire a full- or part-time virtual assistant?
- What interview questions do you want to include?
- Which tests and work samples will you ask applicants to submit?
- Do you want to work with a freelancer or go through an agency/company?

We feel like that last question might be the trickiest, but we don’t want you to get stuck on that decision. So, in the hopes of helping you move ahead and hire that virtual assistant as quickly and easily as possible, we came up with some criteria to help you identify which option would be a good fit for you.

Doing it yourself (hiring a freelancer) might be for you if:

- You’re in the very early stages of your business, where you may find you have more time than you have cash flow.
- You have experience in recruiting and interviewing.
- Team-building is something you enjoy.

Caveats: Don't forget that HR recruiting and hiring are specialized skills. So, go easy on yourself if your first hire doesn't 100% measure up to your expectations. Also, keep in mind that it may seem cheaper to go through the process yourself, but, going back to our "stop doing" concepts, do some math on how much "genius time" (and money) it's going to cost you to complete the process on your own.

Having a recruiting agency to match you with candidates might be ideal for you if:

- You have both adequate time (e.g., for interviewing, training) and money and want to identify the right candidates quickly.
- You have experience in interviewing.

Caveat: Don't go this route if you have any concerns about your ability to determine who will be a good candidate, as you'll have to start anew (and pay a recruiter again) if your first hire doesn't work out.

Hiring a virtual assistant company might be for you if:

- You have the budget but very little time.
- Your tasks require basic, generalist skills, and you just want someone to take them off your hands quickly.
- You're not interested in building a team, therefore, it matters little to you who gets the work done; you just want it to be done.
- Any time off or gaps in coverage would be problematic.

Caveat: Even if your tasks are those anyone with admin skills can complete (i.e., you don't need a dedicated resource who needs to learn your "style"), the fact that various VAs might be working on your tasks may mean you get inconsistent results over time.

Selecting a virtual assistant managed services company might be your best bet if:

- You're on a serious financial growth path, or you have start-up money.
- Professionalism, office space, and team building are important to you.
- You have little time, but you do have the budget.
- Having a dedicated team member who will learn your preferences is a must.

Leveling up to a premium, full-stack virtual assistant company might be your best choice if:

- Professionalism, office space, and team building are important to you.
- Having a dedicated team member who will learn your preferences is a must, but you want to minimize the amount of time you'll need to spend training your VA.
- You have no time, you have the budget, and you want to focus on growing your business and your genius tasks and not "all this other stuff" (e.g., dealing with HR).
- You want to truly partner with a company who will not only test and train your virtual assistant but will also offer you training on how to leverage your team to grow your business.
- You want an extra layer of confidence that comes with knowing your VA has been fully screened and tested.

# Managing a Virtual Assistant

Often it seems business owners expect to be able to delegate tasks to their virtual assistants and that the tasks will be automatically completed, correctly and on time. But just as for an employee who works out of the same location as you do, VAs need to be managed and coached on your overall operations and their specific business tasks. We are breaking it down below, from when they first join your team through their ongoing development.

## **Onboarding Your Virtual Assistant**

Effectively onboarding your virtual assistant sets the tone for your ongoing working relationship, so you'll want to make sure you start off on the right foot. It's much easier to kick off your relationship headed in the right direction than to course-correct after a rocky start.

But what exactly is onboarding? According to Wikipedia, "Onboarding...refers to the mechanism through which new employees acquire the necessary knowledge, skills, and behaviors in order to become effective organizational members and insiders. It is the process of integrating a new employee into the organization and its culture."

Unlike employee orientation, which is a one-time event, onboarding is an ongoing, strategic process designed to help team members not only to understand their role and your expectations for their day-to-day tasks but to bring them fully into your business vision and culture. How their work contributes to your business is revealed during onboarding, and it's an excellent way to demonstrate to your virtual assistant that you value, respect, and appreciate them.

## **Why is Onboarding Important?**

In addition to making your new virtual assistant feel welcomed and valued, an effective onboarding process produces a bunch of benefits for business owners. You want to ensure everyone on your team feels valued, knows the direction they need to take, and how to get there successfully. They need a leader they can look up to and help them drive the vision every day. Effectively onboarding team members is the first step on your team success journey.

In fact, the research demonstrates that companies with well-planned onboarding processes reap the following benefits:



- 54% higher new hire productivity
- 50% higher retention rates, with 69% of their new hires reporting their willing to stay for up to 3 years
- 60% improved revenue
- 63% improved customer satisfaction

By investing the time to effectively onboard your virtual assistant, you set your VA and your business up for long-term success!

### *How to Onboard Your Virtual Assistant*

Many entrepreneurs hope to set their new virtual assistants to task right on day one, but it's far more important to put your initial focus on the relationship and the big picture than on the work itself. So, spend the first few days building that human connection.

#### *Make the Connection*

On their first day, you absolutely must meet with them via Skype or Zoom to make that "face-to-face" connection, even though it's virtual. You'll want to spend the first day - or even the first several days - sharing your business vision and helping them understand their part in it. You want to make them feel like a real part of your team, starting day one.

#### *Clarify Your Communication Style and Rhythm*

Let your virtual assistant know the best times of day to contact you with questions, as well as the best ways to reach you. Consider whether you want to be available to respond to issues and questions throughout the day, as issues arise, or if you'd prefer for your virtual assistant to reach out to you at specified times you'll set aside to reply. We'll dive deeper into communication in a subsection below.

#### *Introduce Your Tools and Systems*

Over the first few weeks of working with your virtual assistant, you'll train them on your processes and using any software they're not already familiar with. But to get started, give them "a tour" of your digital world. Explain which software programs you use for which purpose and show them where they can find documents and other resources they'll need.

## *Break Down the First Six Weeks*

We've seen many business owners, eager to get their new virtual assistant to work quickly, just fling individual tasks at their VAs on their first day or even dumping the entire task list on the VA all at once. This strategy tends to fail miserably. If you really want to have success, we strongly advise you to avoid doing that - to resist the temptation to hand everything over at once.

Breaking down the first six or more weeks into weekly parts, where you gradually introduce them to the tasks and workflow in your business, is a much more effective strategy for training your VA on his or her responsibilities. These first six weeks should focus solely on introducing the VA to the recurring tasks list - those routine, repeatable daily, weekly, and monthly tasks. In the next few sections, we'll get into detail about how to train your virtual assistant, but here an overview of how to break down the recurring task list over your first six weeks together.

### *Week One*

For example, the first week (or at least the first few days) with your VA should be focused on giving them a feel for the business and communicating your style. Then you can introduce them to a couple of tasks at a time. Take one area of the overall task list, and really start to work together on getting that bit right.

### *Week Two*

During your second week, review what you accomplished together in week one. This provides the opportunity for any troubleshooting you need to work through as a team. Then, once you're both confident they've mastered the week one tasks, train them to do a few more. In week two, they'll repeat any weekly tasks they learned in week one and add in the next handful of tasks you trained them on.

### *Weeks Three Through Six*

Over the next four weeks, repeat the process from weeks one and two. Each week, you'll review the tasks completed the week prior, clarifying expectations and answering any questions, and training your virtual assistant on a few more tasks. By repeating the process week after week, it will reveal what it looks like to be really successfully together. Plus, you'll begin to discover where your processes lack steps or clarity, allowing you to make modifications and improve efficiency. By the end of the six weeks, you should have that recurring task list working beautifully and efficiently for you!

### *Beyond the First Six Weeks*

For the first six weeks, you slowly roll out the recurring tasks list because it's one of the most important projects in your business to get right with your virtual assistant. Those recurring tasks and the small to-dos are the things that have been tripping you up and paralyzing you. When you get those streamlined and you have your VA working on those effectively and efficiently, that's when you'll be in a position to hand them over in a stress-free way. That is, although you'll still review your VA's work, you can begin to let go of those tasks because you'll be confident your VA can perform them effectively.

Then, the six-week mark is where you and your virtual assistant may be ready to add new projects to the list. From planning product launches to webinars to events - whatever is going on in your business - you can start introducing your VA to your projects and getting their assistance on those projects.

### **Delegating to Your Virtual Assistant**

Above, we explained that after six weeks working through the recurring tasks list with your VA, you'll be in a position to let go. Finally! You've trained them to do your recurring tasks - and they're doing a great job of it - and freed up time to work in your genius zone. This is what you've been waiting for, so it can be tempting to assume your VA can now work through the tasks 100% on their own. This is the second big mistake entrepreneurs make with their VAs, and we want to make sure you avoid this pitfall. Delegating effectively means maintaining a balance between letting go and maintaining control, and we have two rules for you to create that balance.

#### *The #1 Rule of Delegation*

Obviously, you need to remain the leader in your business, and the number one rule of delegation helps you to do just that. The number one rule of delegation is:

YOU are 100% responsible for everything that happens in your business, even if you've delegated it to someone else.

Your business is your business, and at the end of the day, you are 100% responsible for every single thing that goes through that business. Yep, even those things you've delegated to your VA and they're now doing it.

The key to benefiting from this rule is accepting it internally. That means you never say things to yourself or others like:

"Oh, but I told her earlier..."

"Oh, I've already told him that..."

"I've wrote that out for her..."

(And yes, we've actually heard statements like these from our clients!)

You take responsibility. And you do that by checking in and doing oversight on their responsibilities. And that is being a real leader.

### *The Oversight Rule*

Next, we have the oversight rule. Simply put, "oversight" is the responsibility you have for making sure the output of processes, systems, and tasks are effective, efficient, and correct. It's overseeing or managing the performance of a person or a group.

The oversight rule applies the Pareto Principle (i.e., the 80/20) rule to delegated tasks. Although you're beginning to delegate tasks to your virtual assistant, 20% of each task remains your responsibility. Part of your 20% is creating the task, assigning it to your VA, and training them on it. The rest of your 20% is process and progression oversight.

Process oversight involves checking your VA's work and also asking questions, such as:

- Is this process really working?
- Is it efficient?
- What is the progression of the process?
- How is the task progressing towards the deadline?

Oversight doesn't have to be a daily task. But it's worth have a weekly meeting with yourself, and probably your VA as well, where you go over the work and try to troubleshoot along the way. (We'll get into daily and weekly meetings here shortly!)

So that's your 20%, and the other 80% - obviously - belongs to the virtual assistant. Their 80% of the job is implementing or executing the task at hand, but also reporting and updating you on the progression on challenges they may be facing or on roadblocks that have come up. Communicating back and forth like this is critical. During onboarding, as well as thereafter, encourage your VA to communicate thoroughly and frequently with you. Make sure they understand you'll need them to report back on tasks and provide updates and that it's critical they let you know when a roadblock comes up. A roadblock might be something you can help them with, or maybe it's just letting you know that a task is going to be delayed for some

reason beyond their control. Together, you'll be able to remove the roadblocks or adjust your plans accordingly.

So far, we've talked about how to invite your virtual assistant into your business, how to divvy up the recurring task list over the first six or so weeks, and provided some general rules for effective delegation. That is, you may have noticed that we haven't yet shared any advice about how to keep track of tasks you'll delegate to your VA or how to train them to perform the tasks and to do it to your standards. So let's dive into that now!

### *Creating Your Initial Task Lists*

In the section on what you must do before you hire your virtual assistant, we discussed selecting a project management tool. Your project management software will allow you to keep track of tasks to be completed, as well as to communicate about those tasks with your team. To get started, we recommend creating two lists - one called "Repeatable Tasks" and another titled "Quick To-Dos."

### *Repeatable Task Lists*

You'll start by adding a project named "Repeatable Tasks" within your project management tool. The next step is to create sections for daily, weekly, monthly, and quarterly tasks so that the tasks are divided by how frequently they occur.

This list is critical. It's where you'll focus all your efforts during the first six weeks of working with your virtual assistant, and it's likely this is where they'll spend most of their time beyond the first 6 weeks. This list is where you're going to have all the things that happen on a regular basis, in the same way, using the same process. At The Virtual Hub, we call them the "non-negotiable, no excuses tasks."

Once you've trained your VA on these routine tasks, according to the processes you've set up, your VA should be able to repeatedly perform these tasks without additional input of help from you. The tasks are set up on autopilot as the things that simply have to be done. And unless a technical breakdown or similar occurs, the tasks will get done, properly and on time, without you having to think about them!

## *Enter Repeatable Tasks into the List and Assign Due Dates*

So, after you create the project and its sections, enter the tasks within the appropriate frequency section and set the project management tool to assign a repeating due date for each of them. Project management systems typically include repeatable due date settings where you can determine the interval for which you want the task to come up on the list again.

Some project management tools also offer the ability to set start and end dates for tasks, but it's often on the paid version of the tools. So, if the ability to track both start and end dates is important to you, make sure the tool you're using allows that and it's included in the level of your subscription.

Here are some examples of repeatable due date options your project management system should allow you to set:

- Daily on weekdays
- Weekly on Wednesdays
- Weekly on Tuesdays and Thursdays
- Monthly on the first Friday of the month
- Monthly on the 15th of each month

For instance, if checking your company's "info@" email inbox is a task you want your virtual assistant to do daily, you'll set the first due date and then select "daily" from the 'set to repeat' options. When your VA completes and checks off the task, it will reappear with the next day's date on it.

Let's take that email checking example a bit further. It might seem like a very obvious task, and one that a team member shouldn't need to be reminded to do daily. But doesn't matter how obvious the task is. Put it on the list! You'll want to have EVERY single thing in there so that your VA has to tick it off every day to say that they did it. And by using the project management tool (instead of email), it's impossible for her to say that she forgot. So for your daily tasks, you want to include even the most basic tasks in that section of the list.

### Enter Additional Task Details

As you add tasks, be sure to also assign the task to your virtual assistant so that it appears on their tasks list or dashboard every day when they sign into the project management system. If you've assigned due dates, set them to repeat, and assigned the task to your VA, there should be no reason the task doesn't get done when it needs to be completed.

After you've entered the task name, you'll also want to add a description of the task or a checklist that describes how to complete the task. When you're writing your descriptions, avoid writing big, long paragraphs. Instead, use bullet points, use clear, concise language, and start with a verb that indicates the action to be taken. Here are some examples of how to phrase task steps:

- CHECK email.
- DELETE spam.
- SEND a daily end-of-day report.
- SCHEDULE social media.
- FORMAT blog headings.

Be sure to also include specifics needs. For instance, the specifics of the end-of-day report you want them to share with you might include tasks achieved, questions you have, roadblocks you're facing, and feedback. Whatever the details are, spell them out.

Note that it is a bit onerous to enter all of the tasks, set the correct repeat dates, add the process details and documentation, and assign tasks to the right person. However, the good news is that you will only have to do this once. Of course, tasks may change or you might have a repeatable task to add to the list from time to time, but this list is created in your project management tool, the list is pretty much 'set it and forget it.'

### *Quick To-Dos List*

The next second must-have task list for getting started with your virtual assistant is called "Quick To-Dos." You'll use this list to capture little one-off ideas that pop into your head for things that need to be completed and are simple to hand off to your VA. For example, "Please update out hours of operation on the Facebook page to reflect our summer schedule." Quick To-Dos are tasks that need to be completed just once or on rare occasions or at irregular intervals.

Since these tasks are typically one-time-only items, you don't need to set repeating dates. However, you must absolutely set a due date. When your virtual assistant sees something new pop up on the quick to-dos list, they'll need to know if it's something urgent that they need to fit in today, if it's something they can plan to do tomorrow, or if they have some additional wiggle room for completing the task.

But there are no 'when you have the time' type tasks on your virtual assistant's task lists! Tasks without due dates don't get completed. Assign a date that fits the urgency and importance of the task.

Finally, be sure that you assign the task to the VA and that you include descriptions and any details they'll need to complete the task effectively.

#### Final Notes on Your Initial Tasks Lists

First, keep in mind that these are task lists. That is, make sure every item on these two lists is truly a task and not a big project. Each item on these lists should be tasks that can be completed in 5-30 minutes, max.

Next, make sure you focus those first few weeks with your virtual assistant on the recurring task list and don't expect them to be able to jump into any random tasks you want to pop into quick to-dos unless they happen to be similar to tasks they're already learning during their onboarding (e.g., a task that can be completed using a tool they're already using to complete their repeatable tasks).

Finally, hold off on introducing any new tasks, especially project-related tasks, until your virtual assistant is fully familiar with and working effectively through all of the routine, repeatable and easy, one-off tasks. Ensuring that your virtual assistant has mastered the basics and performs the tasks efficiently and without errors before piling on additional tasks will be worth the wait. Once your virtual assistant can complete the ongoing task list "on autopilot," then you can bring them further into your business and begin to get them involved in project-related tasks.

### **The Training Process**

So, now that you know how to set up the tasks lists and assign tasks to your virtual assistant with your project management tool, you need to start introducing the tasks a few at a time and showing your virtual assistant how to do them.

Please don't think that because you invested a bunch of time, created detailed steps and instructions, and added those details to the tasks in the project management tool that your virtual assistant can take it from there. You do need to have a training process for the tasks that you and the VA work through together.

It might be helpful to think back to when you were a student. When you're learning something new in a classroom, it typically goes like this:

- The teacher provides information and explains concepts.
- The teacher demonstrates how to perform the task or skill by working through an example.
- The teacher and the students work through an example together.



- The students work through an additional example independently, with the teacher available to offer support and answer questions.
- The students complete a new task on their own and hand it in for feedback and grading.
- The teacher reviews the work and corrects and explains any mistakes made by the students.

*For training your VA, take that process and apply it to the tasks at hand.*

- Introduce the task and explain what it is, why you do it, and how to do it.
- Demonstrate how you do it, explaining the steps and decisions you make as you complete the process.
- Ask the VA to complete the task with you there to help out.
- Clear up any mistakes or misconceptions.
- Assign the task to the VA to work through on their own.
- Check their work.
- Discuss it with the VA (i.e., correct mistakes, note what was done well)

Be sure to continue to review their work and discuss outcomes, especially over the first few weeks. You'll want them to get the processes right the first time, rather than to need them to relearn a process because they didn't learn it correctly initially.

### *Training Tips and Tools*

As your virtual assistant is, well, virtual, you need to get creative about how you can provide clear instructions and walkthroughs of your processes and tools. Unlike in a traditional office setting, you can't pull up a chair next to your VA's desk and watch them demonstrate their tasks. So what are your options?

### *Documentation*

Adding a virtual assistant to your team provides you with the perfect opportunity for documenting all your processes and tasks and for developing standard operating procedures (SOPs). These documents will not only help your first team member learn their job and support them on an ongoing basis, but they will also become your go-to documents for training others up, as your team grows. Of course, you will have to update your processes from time to time, as your business or the tools you use change. But investing the time to document everything now will pay off in the future, making it even easier to add new members to your team.

In the section above on creating tasks in your project management tool, we described how to write an effective task. It's worth repeating that you ensure every required step is included in the task, that you stick to bullet points of short, clear text, and that you use action verbs. Once the processes are documented, consider where you'll store the information. For simple, repeatable tasks, simply having a checklist in your project management tool may be sufficient. Your VA can simply tick them off the list, step-by-step as they perform the work.

For more complex tasks or tasks that are performed infrequently, a "just-in-time" checklist that can be viewed online or printed and kept handy is a great idea. Regardless of the specific format, be sure to store documents so your virtual assistant knows where to find them and how to access them. For example, you might create a task folder on the Google Drive as a central repository for your business processes.

And don't limit you and your VA to bulleted checklists of text. Think about whether a flow chart or another visual model of a process might be a more effective solution. For example, if your virtual assistant will be responding to various customer inquiries, a decision tree would guide them to the right choice among possible responses to a given customer's question. Canva includes many free templates for flow charts and infographics, and there are a variety of mind mapping and decision tree tools, making it easy for you to create effective visuals, even if design isn't your thing.

### *Demonstration*

Though you may not be sitting side by side, technology makes it easy to provide task demonstrations to your virtual assistant. We already recommended regular video meetings with your VA, and the video conferencing tools allow you to demonstrate online actions. Zoom, for example, allows you to share your screen, so you can walk through how you do something, and your VA can watch in real-time. Plus, after you demo a task, you can switch and have the VA share their screen with you, as you watch them repeat the task you're training them on. Finally, Zoom allows you to record and save your meetings, so your VA can re-watch what you have walked them through if they get stuck.

Loom is another fabulous video tool that allows you to create screen sharing "explainer" videos. This tool records whatever is happening on your screen with voice-over narration. Say for example you want to demonstrate how to change an element in a Canva graphics template to a different hex color code. You'd simply open the template in Canva, open the Loom app and click 'record,' and perform the steps to change the color code while explaining what you're doing!

Within Loom, you have the choice to record as "screen only" or "screen + camera," where the latter includes you face-to-camera on a small portion of the screen. It's a nice option for making a personal connection with your VA, even though it's not in real-time. Just as for your

process documents, you can create an online “bank” of Loom training videos your VA can access whenever they need to.

### *Documentation + Demonstration*

When you put everything together - checklists, visuals, and demonstrations - you'll have a rich source of training material that taps into multiple senses, allowing your VA to read, see, and hear how to perform the tasks they're learning. Create your training materials to be as clear and vivid as possible, and your new VA will be mastering tasks in a flash!

### *Take Ownership of Oversight*

Earlier, we defined oversight - reviewing and assessing the work of your virtual assistant and others on your team - but its importance bears repeating. There's a notion out there that once your virtual assistant knows what to do, they don't need to be supported and managed on an ongoing basis, and the idea couldn't be further from the truth.

Imagine your past experiences as an employee or think about how you would treat an assistant you hired to work in your physical location. Obviously, employees report to their bosses and have their work reviewed and approved. Conversely, their bosses provide ongoing feedback and coaching so that work is performed effectively. When we think what the experience would be like if the VA was sitting right next to us, it sounds absurd to think we wouldn't check their work and manage their progress!

Whether team members are virtual or sitting beside you, as the business owner, you're like the conductor of the orchestra. Every seat has its talent and an important role to play for making things work in harmony. But without the conductor's direction, you end up with noise.

So, really embrace oversight and the 80/20 rule for overseeing work. Remember that you own the processes and systems, but 80% of the work of the delegated tasks is done by the person you assigned it to. You are always going to have the remaining 20% of the responsibility, which involves you requesting and receiving the reporting you need to review and approve the work.

Keep in mind that initially, your oversight might look more like 70/30 or even 60/40, for the first six weeks to a few months, while you acclimate your VA to your business and train them up. But if you properly and thoroughly onboard, train, and manage your virtual team, you may even find that your oversight eventually only represents about 10% of the work, and your team is able to be responsible for 90% of the work!

If you think you won't have the time for this oversight concept, then you need to delegate more until you do have time! That is, like it or not, you're stuck with it! It's not something you can taper down to 0% responsibility. And it's not something you can delegate. If someone works for you, your job IS oversight. If you're not sure you're willing to take responsibility for oversight, then stop reading now, forget about VAs, and go find yourself a job! (Just kidding - we know you have something important to offer the world.)

### *Celebrate Wins Together*

Entrepreneurs are high-achievers who often are ready to jump on the next big challenge as soon as they score their latest win. But we shouldn't just "move on" to the next goal without commending ourselves and our teams for achieving goals. When we keep pushing ahead toward the next big thing, without stopping to praising the team for successes, it can lead to burnout, resentment, and other negative consequences.

People who are highly appreciated also become highly loyal and motivated to perform. Take the time to acknowledge and celebrate when projects are completed or even when you simply reach the next milestone along the way. Let people know how they were integral to the successes experienced and that they are appreciated, valued members of the team.

This may seem counterintuitive, but don't limit the celebrations to occasions when you're winning. When your team experiences a setback or faces extra challenging times, boost their morale by celebrating how far you've come together and by recognizing how you've overcome difficulties in the past. Reassure your team that you know you'll pull through this together because you've come through other difficulties together. Sometimes a pep talk is exactly what's in order when you and your team need to push through roadblocks. Plus, it shows that you are confident in your team and that you're all in it together - when things are good and when things are bad.

# Setting Expectations and Communicating with Virtual Assistants

## *Setting Expectations with Your Virtual Assistant*

When you're working with a new virtual assistant, especially if it's your first team member, it can be a bit intimidating to know exactly what you can expect from your virtual team member. You may be concerned about what they'll be able to add to your business and to what level.

The good news is that you have the power to maximize your experience with your VA by effectively setting, communicating, and measuring realistic expectations. But doing this can be a bit tricky, especially when it's new to you, and you don't already know how. Not to worry! We're about to walk you through it.

## *Define Expectations*

The first thing you must keep in mind is that your VA can't read your mind. We know you already knew that, but most of us have a tendency to assume that everyone thinks the same way as we do. So you want to be mindful of that, as you define your expectations. Don't leave anything 'in your head.' It needs to be spelled out in black and white.

## *Clarify What's Important to You*

Asking yourself, "What's important to me?" is a great place to start. Clarity around the types of work and overall behaviors that are important to you is critical. Your virtual assistant can't meet your expectations if you can't define them for yourself! So, think through what success looks like to you, both in terms of task outcomes and your relationship with your VA.

Having your detailed task list, with step-by-step processes defined ahead of time will help you with some of the specific results you're looking for, but you need to push further and consider other types of outcomes. For instance, what's your communication style? Are you the kind of person who wants to be in constant contact with your virtual assistant throughout the day, or would that drive you bonkers? Instead, would you prefer to have your VA save any questions or issues for you to address at a specific time or times of day?

As another example, when your virtual assistant comes up against a roadblock, do you want them to come to you straight away, or would you rather they take some time to come up with an idea for a solution before reaching out to you?

What other values and behaviors are important to you that your virtual assistant will need to know to be set up for success? Take time to reflect.

### *Know What Stresses You Out*

Another way to determine what's important to you and define your expectations is to think about the things that most stress you out, so you'll also be able to clarify what not to do. For some business owners, missing a deadline might push them over the edge, whereas others might get super stressed if tasks don't get marked off in the task manager (even if they're done!).

### *Now Write it Down!*

Take everything you came up with about your expectations and write it down! Assume nothing and spell it all out in detail. Capture it in various places where it makes sense. You may want to have a master expectations document, as well as keep expectations in writing where the tasks occur (e.g., in your task manager or in process documents). If it's not written down - and it place where your virtual assistant can reference it - it's not well communicated. And speaking of communication...

### *Communicate Your Expectations*

We're going to dig deeper into communicating effectively with your virtual assistant in a section below. But for now, let's just say - and it should be obvious - that these expectations you're taking time to develop and write out need to be shared with your VA. This communication should begin during the onboarding process, but should also take place on an ongoing basis. Be sure to go through the process of defining your expectations as your relationship with your VA goes on and you begin handing off new tasks to him or her. Also, be sure to explain why you have these expectations.

So, take the example of the business owner who doesn't want to be pinged all day long with questions, concerns, and issues? *Why?* Is it simply disruptive to your own workflow, making it difficult for you to work in your genius zone? Or is it because you tend to be on the move, from place to place, and meeting to meeting, and it's just not feasible to get back to your virtual assistant on an as-needed basis throughout the day? The better your VA understands

'what makes you tick,' the more successful they're going to be in their work and the more effective your relationship is going to be.

So far, we've been discussing general expectations and communication. Below, we're going to drill down into specific measures for managing and evaluating performance with your virtual assistant.

### *Performance Manage Your Virtual Assistant*

Unless you have been an entrepreneur from the jump, you've experienced - and possibly even given - a performance review, where an employee and their boss sit down and consider progress made toward the objectives specified for their job success. These reviews allow companies to assess the performance of individuals, departments, and the business as a whole and to make adjustments to their plans to meet business goals. For this process to be effective, measurable criteria for success must be established and targets set for those measures.

Performance management is critical to business success, and it's equally if not more important to apply the process to virtual teams as a company would with in-house employees. In order to know with confidence that your virtual assistant's performance is moving your business forward, you ways to measure their performance and in a way that's aligned with your overall business goals.

### *Establish Key Performance Indicators*

Key performance indicators (KPIs) are what companies use to measure how people, teams, and the overall organization are progressing toward their goals. KPIs are objective criteria and typically take the form of a "SMART" (Specific, Measurable, Attainable, Realistic, Time-bound) goal. You can think of KPIs as the glue that connects everyday tasks to your business success. As an added bonus, collecting, reporting, and analyzing KPI data not only helps you create the strategy and tactics for achieving business goals, but it also increases communication and engagement within your company by connecting everyone to your business vision and larger purpose.

You may recall how we emphasized bringing your virtual assistant into your business vision when you are onboarding them to your team. Reminding them and involving them in your business vision should also be an ongoing discussion. In fact, as you establish KPIs and milestones for your virtual assistant, share the thinking behind the measures you've developed and allow your VA to add their input to boost their buy-in. Plus, they may have a great idea of their own about how to measure their performance and ensure their efforts are aligned with your overall goals.

Keep in mind that the ideal number of KPIs is somewhere around five to seven, so we're talking about the core metrics you want to look at to determine progress, not every tiny detail. Once you and your virtual assistant have settled on the KPIs, be sure to put them in writing along with the plan for tracking and reporting them, as well as how often you'll review them together. Make sure the two of you review progress at intervals in between formal performance reviews so that you can make adjustments if measures are lagging behind your targets or milestones. For example, if you intend to have just one formal, annual performance review, review the KPIs together quarterly. Otherwise, you'll miss opportunities to improve performance along the way and will be at higher risk for missing your annual targets.

Be sure to weave your reporting requirements for your virtual assistant into your project management tool and into your communication structure (best communication practices are described below). Make it crystal clear so that you will have access to the numbers whenever you need to look at them.

As a final note on expectations, make sure that both you and your virtual assistant know how you'll assess whether or not expectations are being met. What does success look like? What are the results you're after? What does failure look like?

Again, let's go back to an example from above. If you're the type of business owner who wants all of the tasks not only completed but ticked off the list in the project manager at the end of the day, that's a success criterion. And it's a great one because it's black and white - the list is either done or not done. For other areas, success might not be so yes or no, so be sure to back up your expectations with instructions, criteria, and even examples of what does and doesn't meet expectations.

Finally, you may want to implement some sort of success dashboard where the day's or week's results are reported. This both keeps everyone on the same page and allows you to look at progress over time.

If you'd like to dig further into assessing your VA's performance, tune into "The Quick and Effective Way To Assess The Success Or Failure Of My Virtual Assistant" on The Virtual Success Podcast.



# Communicating with Your Virtual Assistant

Effective communication style and structure can make the difference between success and failure when working with virtual assistants and other remote team members. You must create an open and safe space for your team to talk to you about their work and their experiences and create clarity around both the types of information you want from you VA and how frequently different types of information need to be communicated to you.

Planning out your communication channels and structure ahead of time helps to ensure that you and your VA both get the information and feedback you need from one another and that communication occurs in a timely and routine manner. Below we review the elements of a sound communication plan to help you develop yours for success.

## *Establish a Meeting Rhythm*

Your team meeting rhythm is the system you create for communicating with your virtual assistant on a daily, weekly, monthly, and quarterly basis. The structure of the meetings and communications that take place at these different time frames is up to you. That is, you make it work for you and your business needs. But we have some recommendations for the basics, plus some additional ideas you can tweak for your needs.

## *Require Daily Huddle or Check-In*

When your relationship with your virtual assistant is new, we'd highly recommend having a daily, 10-minute video meeting using Skype or Zoom. Early on, you and your VA are going to have a lot of questions for one another. They'll likely have task- and process-related questions to address with you, and you'll want to know how they're progressing. Plus, meeting "face-to-face" every day will help nurture your new relationship, help you get to know one another well, and make you feel like a cohesive team.

Some of our clients do a daily "stand-up" meeting with their virtual assistant or their larger team. Many brick and mortar organizations have stand-up meetings, and the idea behind it is that standing helps ensure the meeting is quick, as you can't get quite as comfortable or settled in while you're standing as you may while sitting around a conference table.

Whether you literally stand up or not, we recommend this daily “huddle” to check in with one another. And because neither of you wants to take a ton of time to get through this meeting, make sure you have a tight meeting agenda or checklist you, so you can get through what you need to quickly. For example, Taki Moore of Coach Marketing Machine has his team do a daily huddle where each person addresses three simple questions:

- What did you get done yesterday?
- What are you working on today?
- And where are you stuck?

Those questions allow the team to both keep each other up to date and to keep each person moving forward on their projects and tasks.

Meeting “face-to-face” every day will help nurture your new relationship, help you get to know one another well, and make you feel like a cohesive team.

At some point in your relationship with your team, everyone may be communicating their updates and needs so well that you could move away from having a Zoom meeting and, instead, post the daily update in your preferred communication/chat channel, such as Slack. For instance, we know of one team who posts a daily update in response to these prompts:

- A win from yesterday.
- Three things you’re going to rock out today.
- What help do you need and from whom?

Also, if you move from a meeting to another form of daily communication, set a structure around that. For example, the rule might be, “Post my responses to the daily prompts by 9:15 am every weekday.” And it is smart to have your daily check-ins at the start of each day, as this will help to prevent both of you from having to respond to comments in your project management system or chat channel throughout the day.

How you set your agenda or the questions you address is up to you, but please don’t skip having a daily means for checking in with one another. If you fall out of the habit of daily check-ins, missed deadlines, errors, and other problems will begin to occur.

### *Host Weekly Meetings*

Now, given that you’re going to be in direct contact daily, a weekly meeting with your virtual assistant might sound redundant. However, we recommend having a formal, weekly meeting together, even if you feel that there’s no need. And “formal” means that it’s non-negotiable, it’s at a set day and time on the calendar each week, and it, too, has a set agenda.

You'll be dealing with task-related items daily, so the weekly meeting is a bit broader and more tactical in nature. You'll have the opportunity to discuss higher-level topics, which keep your vision and the big picture of your business top-of-mind for your VA or team. Further, you may want to incorporate a progress report your VA creates for you each week, and during this meeting, you discuss progress and metrics.

Again pulling from Taki Moore's advice, his team addresses three big things that are on each person's plate right now. They examine their numbers and consider how individuals and the business are tracking. Finally - and this is key - they come up with action plans that identify who does what by when, as well as any people or resources they need to pull in to execute the plan.

In addition, it sets the tone for the week and allows you both the chance to address roadblocks, provide feedback, gain approval for work, discuss ideas, and reset anything that's out of alignment. It's a good business practice and leadership strategy to get you and your team into a routine of presenting information to each other and sticking to processes and deadlines. For example, if you have little or no structure to your week and how you work, it will rub off on others - and vice versa. As the leader of your business, you set the mood, the tone, and the quality level that's expected.

So, set a weekly meeting for 30-60 minutes and create an agenda that you stick to week after week to maintain the communication structure. To get you started, we have a sample weekly meeting agenda that you can grab and modify to suit your business needs.

Occasionally, something will come up during a weekly meeting that's too big to address in 30-60 minutes, such a big decision that needs to be made. Those issues can be parked until you have your next monthly meeting.

### *Hold Monthly and Quarterly Meetings*

Daily and weekly meetings are going to take care of tasks and tactics. Having monthly and/or quarterly meetings provides you with time to get more strategic with your team. Depending on the size of your team and the nature of your business, these meetings might take anywhere from 90 minutes to half a day.

You may want to do this with your daily or weekly meetings as well, but monthly meetings often kick off by everyone reporting their wins for the month. This is a great opportunity for team building and generating awareness around the great things people are doing. So start off on the right foot by celebrating what's working first.

Next, move on to what's not working and work through roadblocks and developing solutions together. Finally, refer back to your list of parked topics that may have come up in a weekly meeting or some other means. Pick one or two of them - don't bite off more than you can chew - and spend an hour or so breaking them down and crafting a plan for the month that addresses that topic.

### *Create Structure for Communicating Outside of Meeting Times*

Having a solid, daily, weekly, and monthly meeting rhythm is going to help you to reduce the number of questions or problems you have to address throughout the day. But there will definitely be instances where you and your virtual assistant need to communicate with each other during some part of the day. For example, you might have had a new, urgent task that popped up that you need him or her to handle today. On the other hand, your VA might run up against an unexpected roadblock and need assistance that can't wait until the next day's check-in.

### *Select Your Quick Communication Tool*

Fortunately, technology can help us improve our communication flows. Chat tools such as Skype are great tools for shooting each other quick questions and updates throughout the day. Slack is another amazing tool for this, as it allows you to easily search for old messages and you can set up topic channels for different purposes (e.g., marketing, events, reporting). For situations where it's easier to talk things out than to write them, many teams like to use the walkie talkie phone and desktop app Voxer.

Also, as we discussed in project management, your tool (e.g., Asana) allows you to tag people and comment within a given task or project, which is great for keeping everything in one place. However, you probably want to limit your project management tool to project details, instructions, and subtasks/checklist and not clutter it up with chatting back and forth.

If you want to stay as organized as possible - as well as maintain your sanity - settle on one tool for quick communications that are not task instructions, especially if you have multiple team members. Allowing for the use of more than one communication tool will result in having pieces of communications in different places, and it will be harder to keep track of everything.

### *Develop a Quick Communications Structure*

Even though your quick communications tool is for one-off issues or questions that pop up, it's still important for you to create a structure around that, as well. If you're someone who's comfortable responding to chats when you're pinged on the app, you can let your virtual assistant know that you'll be available to reply throughout the day. On the other hand, if that's not your preference or your schedule doesn't permit that type of responsiveness, pick a couple of times a day when you'll check in on messages and let your VA know when those times are.

Whether you respond to notifications as they come in or you batch your replies, you may also want to create some clarity around the types of issues that are urgent and the items that can wait. In addition, you may want to set up an "S.O.S." protocol for when something needs to be addressed urgently. That could be starting an urgent message with a codeword or phrase ("Red Alert!") that will pop up on a notification. Or it could be using a secondary communications channel (e.g., text message) that's only used for pressing matters.

### *Check out our three-part podcast on communication*

The Virtual Success Show hosts Matt Malouf and Barbara Turley take listeners through three key items of communication: recognizing your communication style, giving and receiving effective and constructive feedback, and handling challenging conversations.

### *Provide Constructive Feedback*

As discussed in the onboarding section, virtual assistants are not mind readers. And no matter how solid you think your task instructions are laid out, mistakes will be made or something won't quite live up to your standards. Keep in mind that it's totally normal, but also recognize that you will have to provide the feedback needed to get your VA on track. And even though, in most cases, providing feedback isn't a negative thing, it can feel negative and a bit intimidating if you don't know how to do it properly.

Above all, you want your VA to be successful because his or her success helps to determine your success. So providing timely and ongoing feedback is going to be key to helping your VA help you.

## *Don't Avoid Feedback*

Often business owners and other leaders will drag their feet about giving feedback or avoid it altogether. This reluctance to share feedback is rooted in fears, such as being disliked or getting rejected. Alternatively, maybe we had a bad experience on the receiving end of feedback from someone who wasn't good at it, and we're afraid of making someone else feel like that. But when you know how to offer feedback effectively, you can overcome these fears.

Also, when things go wrong or completed work isn't up to your standards and you don't provide feedback, you're creating a lose-lose situation. Your virtual assistant loses because they don't know what they're doing incorrectly, so they can't fix it, which limits their potential to become the highly valued team member you're hoping they'll be. On the flip side, you lose because you're frustrated, and you're either forced to settle for work that doesn't meet your liking or you're spending time reworking things yourself.

But remember: You added a VA to your team to be a part of your team and to help you grow your business. If you don't invest the time to provide feedback, you're squandering the potential in your investment in your virtual assistant. However, when you deal with problems early and head-on, your VA is not only going to improve but also feel like a more valuable member of the team as someone whose efforts and skills you respect.

## *Be Clear and Direct with Feedback*

Giving your virtual assistant vague feedback such as, "This isn't what I was hoping for," or, "That's not quite right," and asking them to re-do or fix it isn't giving feedback at all. If you can't articulate what changes need to be made, how could your VA possibly do a better job the second time around?

It's important to hold on to the mindset that your VA is a team member and an investment in your business and be willing to take the time to nurture that investment. That is, you're working together to achieve the same goal. So before you sit down to provide feedback, you may want to ask yourself some questions, such as:

- Where do I think this broke down?
- Did I create and hand over the task in an effective manner in the first place?
- What exactly would I like to be done differently? And how can I communicate that more clearly?

Get very clear on what it is that you don't like and what you're looking for instead, and then have a collaborative conversation around the issues. But keep in mind that effective feedback goes both ways. During the conversation, your virtual assistant may have feedback for you about how to explain tasks or provide instructions the next time - that is, if you're lucky! Allowing for a back and forth flow of information and ideas can only benefit you both.

Furthermore, keep in mind that feedback isn't a one-time conversation. Once you've provided the initial feedback, have a plan for the next couple of weeks to keep the conversation going and let your VA know about it. Assume them that you don't want to micromanage them, but that you want to stay close to the issue and allow them to give you feedback about how it's going along the way. Let them know that you want them to be empowered to do their job well and feel really confident about it.

Finally, because sharing feedback is collaborative and a conversation, be sure to share it on a call with your virtual assistant, preferably a video call. Video allows you both to pick up on expressions and body language, making it easier to have a true dialogue. But you must strictly avoid providing feedback less formally, such as via your chat program. Avoiding a face-to-face interaction and using a text method for feedback is a surefire way to have more, not less, misunderstanding. Plus, firing off a printed message for something this important is pretty dismissive, like either the work or the VA isn't that important to you.

### *Be Prepared for Difficult Conversations*

At some point, you are likely to need to have a difficult conversation with your virtual assistant or another team member or contractor. And honestly, we know these are never easy for either party, so we want to offer you our best practices for having these discussions to make them as comfortable and effective as possible for you and your team.

### *Be Candid and Timely*

Often, we all drag our feet about having a difficult conversation, whether it's work-related or in another context. Another pitfall many people fall into is having the conversation but sugarcoating or downplaying the issues instead of being completely candid. As human beings with emotions, difficult conversations typically make both parties uncomfortable. In short: they're hard. However, putting them off or failing to fully address the concerns only makes things more uncomfortable in the long-run, as the concerns remain unchecked and grow to take on a life of their own.

When a problem or concern needs to be addressed, plan to have the conversation as soon as possible. It's easier and more effective to give and receive feedback while the issue or event is fresh in everyone's minds. Plus, putting it off only makes your fears and doubts about initiating the conversation grow, making it harder and harder for you to "face the music" with each passing day. Our additional tips below will help you plan for an effective and candid meeting.

### *Set up a Video Meeting with an Agenda*

First of all, you want to host a "formal" meeting rather than a simple "chat." So make it official and set a meeting and provide an agenda. This elevates the importance of the discussion and helps both parties put their best foot forward. The meeting topic and agenda allow your virtual assistant to come prepared for your discussion and prevents them from being caught off-guard. Don't surprise people, as that never goes well. They'll feel ambushed and be far more likely to react defensively, hindering your ability to have a constructive and effective conversation.

Also, avoid having this conversation over the phone, and absolutely avoid sharing your concerns via and voice or text messaging apps. Host the meeting via Skype or Zoom so that you can meet "face-to-face," which allows for a more personal experience and for each of you to see and respond to body language. It might feel easier to do it over the phone because you avoid looking your VA in the eye or to use messaging, which you can shoot off to your VA without having to address their responses right away. However, this will not result in effective resolution to the concerns at hand, and it's terribly dismissive.

### *Stick to the Facts*

As humans, it's virtually impossible to completely take the emotion out of the interaction, but sticking to the facts helps to minimize any bad feelings that are going to come up. In the three-part series on The Virtual Success Podcast, co-host Barbara Turley recommends opening the meeting with a statement that invites the other party to the discussion and gets right to the point, such as, "Thank you for coming to the meeting today. The main reason for today's meeting is for us to discuss a few key issues that have been occurring and for us to get a clear set of steps on how we're going to fix it moving forward. Is that okay with you?"

Then come prepared with the facts related to your concerns so that you can your virtual assistant can resolve the challenges objectively and effectively. At the same time, ensure that you are sufficiently candid to allow for an effective and complete action plan that eliminates the problem in the future. It's not always easy to do, and it may feel more comfortable to be "nice," but candor is far more effective, plus it helps the other party in the discussion know that you care.



If that seems counterintuitive, consider Matt Malouf's take on "nice," from the podcast episode referenced above. He relies on the acronym for nice: "nothing inside me cares enough." When you care enough about your work and about your people, you're willing to take the tough steps to make things right and to help others get better. Being overly nice to people may seem like the kinder thing to do, but people actually appreciate constructive feedback and the opportunity to improve. When you're not willing to have the tough conversation, it's akin to giving up on the other person. And eventually, they'll read between the lines and recognize your lack of concern about them.

### *Leverage Mistakes*

Mistakes are going to happen. It's simply inevitable that mistakes will occur, especially during the first few months with your virtual assistant and when you introduce your VA to new tasks and projects down the road. They're natural, but take the perspective that mistakes are gifts. They're gifts to you because they show you where your process is inefficient and ineffective and where it may need some extra work. Mistakes point you to where you have the potential to improve.

In addition to mistakes, you and your VA will experience some confusion along the way. A process may be clunky, something will take too long, you'll find yourself answering endless questions, and so on. These are all symptoms that there's something unclear in the process itself or in the process instructions. When mistakes are made or your VA is struggling with something, don't assume it's the VA's inability to do things properly. Take a look at your processes and verify you have efficient processes that can be followed by anyone.

We want to impress upon you the utility of process analysis when things don't turn out or go as smoothly as expected because, at some point, your business is going to grow even more, as a result of hiring your VA. And soon, you may want to add other team members, and you want to know that you don't have to train someone up again. Taking the time to optimize your processes now means you won't need to go through this again/ You want to get it right the first time and ensure you have processes that are really good.

### *Create Structure*

We talked about having structure around communication and reporting, but you will also want to create structure for when and how your virtual assistant works for you. Do they work during a specific time frame each day when you know they are online? This may be a requirement for your virtual team if you are giving them tasks that must be performed during your operating hours, such as responding to customers on the phone or email.

On the other hand, you might have your VA simply work a certain number of hours for you each day (or each week) and track their time using an app such as Harvest or Toggl? Typically, we would recommend having your virtual assistant have set, daily hours for efficiency. Why? Consider the maxim: "If you want to get something done, give it to a busy person." Because, as humans, we tend to be less productive when we have too much time and flexibility to accomplish our tasks.

You can, however, create structure with flexibility. As long as you communicate and agree on a structure with your virtual assistant - for example, receiving daily progress updates - you can allow for some flexibility in how your VA completes the work.

### *Avoid Burnout*

The appeal and benefits of virtual work are well documented, but researchers are finding that virtual workers are prime candidates to suffer from burnout. Virtual assistant exhaustion is a real concern from which your business will suffer if your VA is suffering. It's harder to notice the signs of burnout when you're not seeing someone in person each day, so consider a few steps to balance the workload.

### *Balancing the Workload*

What comes to mind when you think of "workload"? Our first thought tends toward the actual list of tasks a person has to complete. But it's not that simple.

You may have noticed that the concept of "mental workload" has been trending lately, especially as it applies to both work and home life. The fact is, we're not just impacted only by the actual physical workload, it's the mental - and even emotional - workload, too. A large portion of mental exhaustion can be attributed to this mental labor.

Consider what this might look like for your virtual assistant. Think about every email, every quick ping on Slack, or every "can you quickly look this over" or "what do you think?" request you might send. Add to that the timing around when those are received. Are they restricted to work hours, or is the virtual assistant getting messages after hours and on days off?

And even when those messages are happening during work hours, what's the VA's expected response time? Interruptions such as message notifications divide our attention, directing it away from our current task. We're so used to being bombarded by notifications these days, so this might not seem like a big deal. However, there's a high cost to task-switching in terms of the mind-fatigue that leads to burnout, as well as in terms of productivity. In fact, it's believed that it takes an average of 23 minutes to get back on task following an interruption!

Here are a few tips about minimizing the potential for burnout:

- Have an established routine and avoid the chaos of random interruptions.
- Establish a hard stop for work.
- Be clear about priorities and emphasize quality over quantity. (If everything is “high priority,” then nothing is!)
- Have (and help to keep) clear boundaries - there’s a big difference allowing flexibility and expecting your team to be at your beck and call.
- Allow for breaks - we call need and benefit from them!

# Challenges with Virtual Assistants

As with any employee, especially when leading a team is new to you, a variety of challenges can pop up when you add a virtual assistant to your team. Yes, the virtual environment presents a different set of circumstances than that of an in-house team. However, contrary to what seems to be the widespread belief, most of the challenges encountered are related to things like your mindset, your systems, and how you handle mistakes, rather than having something to do with the fact that the work is being done virtually.

Lucky for you, you have us to walk you through common challenges and how to overcome them! Plus, as you'll see, if you follow the rest of our advice about investing time in creating your systems, training your VA, and so on, you will mitigate the number and intensity of these challenges.

## *Challenges with Your Mindset*

The one thing that's probably most likely to trip you up is your own leadership mindset. This is a good news/bad news situation. The bad news is, you're likely to get in your own way. The good news is that you are in the driver's seat when it comes to eliminating mindset as a challenge in working with your virtual assistant - at least you will be if you take our advice and face the mindset challenges head-on!

We encounter the leadership mindset blocks below with our clients all the time. And it doesn't matter what kind of business owner we're working with. These issues seem to come up for everyone - and our leadership team at The Virtual Hub would confess that we've been there, too!

### *It's Quicker or Easier to Do It Myself*

The number one mindset block we hear is, "It's easier to do it myself." So let's be honest. Much of the time that statement will be true because it's your business, you've been doing it yourself for quite a while, and you're therefore a whiz at it. But it's time for some tough love. If you keep doing everything yourself, you will never move your business to the next level. Period.

Yes, it's quicker and easier for you to do it yourself right now. But over time, it's going to hold you back, and with proper training, your VA will soon be expert at it, as well. In fact, they may eventually be even quicker and more talented at certain tasks because they'll be more focused on them than you can be within the whirlwind of managing your entire operation.

Plus, even if it does take a little bit longer for your VA to do it, but their hourly rate is significantly less than yours (which it certainly should be!), it's more cost-effective, both financially and mentally, to delegate it to a VA. So learn to let this one go!

### *It Might Not Be Done Right if Someone Else Does It*

Like the last one, this mindset block trips people up because it's also true, at least at the moment. And no matter how well-prepared you are, with your systems and tasks lists, you will face a time when you'll give a process to your virtual assistant, and it won't quite go right the first time. But this is why you, as the business owner, take responsibility for oversight and provide constructive feedback to your VA. Over time, your VA will learn exactly how to perform tasks to your specifications – and they will be off your plate, giving you back time to spend in your genius zone. So pushing through this mindset issue when it comes up for you will be worth it to you in the long run.

Plus, mistakes can be gifts to your business. We don't mean to leave you hanging, but we dig into that in another section, below!

### *I Don't Have Enough Time to Set It Up Right Now*

This one is a classic mindset block! We hear all the time, "I just don't have the time to get a virtual assistant up and running," or, "Setting up for a VA will take me more time than I have right now." And we're not being snarky when we reply that, if you don't have time to get a VA set up and running, then you don't have time to grow your business! (Okay, maybe a little bit snarky.)

You simply have to bite the bullet and create the time and space, or you are going to stay running in place forever. No matter how hard it may seem, especially during the first month, you have to move past this mindset block and find a way to invest the time in bringing on a VA. Just trust us on this one. This block will keep you stuck, but the time that you spend now to set up your VA is an investment in your time that will come back to you – with dividends – later.

### *It Will Take Too Long to Explain It*

This one is sort of a corollary of the previous mindset block. Maybe you're prepared to take the time to create the systems and processes, but it's the ongoing training and oversight that feel daunting and time-consuming to you. Sure, you're going to have to not only do the process mapping but also train your virtual assistant on the processes. And, yes, it's not going

to be a “one and done” situation, where you explain it once, and your VA performs to perfection. It takes time.

But, as we said above, the time you invest now will come back to you, which will allow you to propel your business forward. If you don't take this step and invest in a VA, it will paralyze you and your business. Let go of this idea ASAP!

### *I Can't Trust that Someone Else Can Do It Properly*

Put your hand up if you're a control freak. If your hand isn't up, you're likely lying to yourself. (Or maybe you're reading this in a public place and you're just trying not to look ridiculous.)

As entrepreneurs and business owners, we tend to be natural control freaks. It's also usually why we are successful - because we care deeply about our business. To help you get through this block, really bring your VA into your vision and get clear with them on what success looks like.

And just resign yourself to the fact that a thing or two won't be done properly the first time. But you can use the instance as an example to go back to with your VA to explain exactly what is needed for success and what success looks like to you.

### *I Will Lose Control of It All If Someone Else Does It*

Another control freak problem is behind this mindset block. But the paradox is that if you are doing everything yourself, it means you are out of control now. You think you're in control, but you're not. Needing to do everything means that your business is controlling you and not the other way around. What really gives you control? Delegating effectively and communicating successfully.

Something amazing happens when business owners let go of this mindset block, add to their team, and learn to delegate like - well - a boss. They end up feeling unbelievably in control of their businesses even though they're not actually the ones doing all the work. When you become the one who is overseeing the business and leading the ship, it's an amazing feeling. Does it take work to get there? Yes, it does, and it's not going to happen immediately. But please believe us when we implore you not to let this block stop you!

### *Letting Go and Moving Past Mindset Blocks*

In the short term, it may be a bit tricky to push through the blocks, especially when there will be evidence to support your belief in them (e.g., your VA makes a mistake). But the long-term gains of getting through these blocks are astronomical. When you take a leadership position in your business, it can grow and grow and grow. That means becoming a true leader by establishing the right systems and processes and recruiting the right team. This is how people grow scalable businesses, and can grow and scale multiple, 6- and 7-figure businesses. If you're wondering how the heck they can do that, when you can't stop spinning your wheels in one business, leading a team is the secret. If any of these blocks are resonating with you, know that you are not alone. Nearly everyone experiences at least one of these blocks as they grow their business and their team. But these beliefs will paralyze your ability to grow the business that you truly want. So when you see these blocks come up, and you feel them in your head and your heart, know that you're not alone but push through them. Repeat to yourself, "This is a leadership block and it's keeping me stuck." And then keep going!

### **Challenges with Communication**

Communication is going to be the key to accomplishing anything and to the success or failure of your work with your virtual assistant. In the sections about preparing for bringing a virtual assistant on board and managing their work, we described best practices for communication in detail. Knowing when and through which channels you'll be communicating throughout the day or week helps to manage expectations and workflows. Creating clarity around communication preferences and documenting everything in your project management tool ensures that you are on the same page and up to date with one another.

If you establish and maintain an effective communication rhythm, you will experience far fewer communication challenges than if you don't stick to a solid plan. But even the best-laid plans run into issues, so here are some additional ways to ensure the effective communication required for the virtual environment.

### *Lack of a Company Culture*

But there's a little bit more to it than having a clear meeting and reporting structure. You, as the business leader, must also maintain an open channel of two-way communication. Communicating with your VA shouldn't be a one-way street, where you assign tasks and they merely complete them and report results. Your VA should be comfortable coming to you with problems or roadblocks and even ideas of their own.

Establish a nurturing environment of mutual trust with your team by creating communication channels where everyone can share openly and honestly. And nurture your relationships with your virtual assistant or team by communicating beyond the needs of the business. Spend time getting to know one another, as you would in a brick-and-mortar environment. You may even want to slate some “social time” on your calendar from time to time. When you build a strong relationship with your team and communicate frequently, team members are more likely to share and contribute, which builds trust and cultivates creativity and innovation.

Other behaviors that cultivate trust and open communication include discussing business values (e.g., respect, reliability, and honesty), listening to one another, and focusing on consistency in communication. Also, make sure your task management tools are transparent so that everyone can see who is working on what. Even better, acknowledge everyone’s contributions to the business routinely during weekly and monthly meetings.

Don’t let the virtual environment prevent you and your team from having a clear company culture - create one. For more ideas about team activities and building a culture of trust, visit The Virtual Hub’s resources page for downloadable PDF guides.

### *Not Being Clear About Who Does What and by When*

Some of the tasks you assign to your virtual assistant may have a collaborative element. That is, you both need to have your hands in part of the process. For example, say content management and scheduling are tasks you want to hand off to your virtual assistant, but you continue to be the content creator. In order for your VA to successfully complete their tasks, they need to get the content from you and in a timely fashion. Make sure you are clear on how long the VA’s portion of the task will take and you give them your content with ample time to complete their steps by your desired publish dates. And don’t guess or assume. Know how long it takes your VA to complete tasks rather than assume it will take them the same amount of time as it might take you.

Now, if you’re reading up on virtual assistants because you intend to hire your first team member, this next bit isn’t relevant to you just yet. But for anyone who has more than one person on their team, be sure to assign tasks to specific individuals. We’ve heard of cases where the business owner is going to be out of pocket, so she emails the team, asking them to complete X, Y, and Z while she’s out. But she didn’t specify which team member was to work on which tasks. Without that clarity, each team member is likely to assume that the other team member(s) are completing the tasks, and therefore, no one gets the work done! And it’s not their fault. It’s up to the leader to be clear when delegating work.



### *Feeling Like You Don't Know What Your Virtual Assistant Is Working On*

If you follow the advice about how to map out clear, step-by-step processes, use a project management tool, and nail down a communications rhythm, you're unlikely to be in the dark about what your virtual assistant is working on. However, it still comes up all the time - business owners feel a sense of uncertainty around their VA's work.

Let's just say it one more time: provide clear tasks and deadlines - using your project management tool - and keep the communication channels open, and you can avoid the doubts some business owners experience when it comes to their VAs.

But, in addition, have reasonable expectations around how much time tasks take for your VA to complete, and remember no one is on-task every minute of every workday. So, for example, if you know one of your VA's tasks would take you 15 minutes to do, allow them 30 or so minutes to complete it. That is, double or even triple the amount of time you would need - at least at first. It's a cinch for you because you've been doing it all along, but the task is new to them.

Finally, keep in mind that everyone needs breaks throughout the day - to grab a coffee or water, to run to the bathroom, to eat, or even just a time-out now and then to give our brains and eyes a break from the computer. In a shared, physical work environment, you wouldn't expect someone to be tied to their desk all day, so don't expect it because your work arrangement is virtual. On the whole, remote workers are more productive, anyway, so the amount of downtime during your VA's working hours is likely to be far less than what you might expect in a face-to-face setting.

If you'd like our thoughts on why business owners may not know what their VA's are working on and what to do about it, tune into The Virtual Success podcast.

### *Challenges with Geography*

Okay, so geography, per se, isn't really the problem. The challenges your relative geographical locations have to do with the time zone and cultural differences that may exist if you opt to hire an offshore VA - which we highly recommend you do. Although many business owners may see these differences as huge obstacles to working with an overseas VA, we barely see these as obstacles at all.

## *Time Zone Differences*

If you want to be able to communicate with your virtual assistant in real-time throughout your workday, or if you need for your VA to interact with customers during your working hours (e.g., replying to issues via email), you may think that an overseas VA is out of the question. However, because being a virtual assistant is a highly desirable job in various parts of Asia, many VAs have chosen to work during non-traditional hours in order to accommodate their clients. So, you have a high probability of finding a qualified overseas VA who is willing to work during your operating hours.

On the flip side, residing and working in different time zones is something you might want to leverage for your business. If you...

- Don't feel that you need to communicate with your VA several times a day
- Would prefer not to be pinged with questions throughout the day
- Want to extend your hours to improve customer service, or
- Like waking up to completed work...

...then a virtual assistant working opposite your hours might be just what you're looking for!

Plus, there are so many tools for communicating with one another, such as using Loom to record screen-sharing video demos, that syncing your schedules may not be essential. Just make sure that there is some overlap or that the two of you can adjust your hours so that you can have the face-to-face video calls you'll have as part of your communication rhythm. We recommend having at least two hours of overlap with your VA in your daily schedule to ensure clear communication and productive workflow.

Time zones can be an obstacle, but they don't have to be! There are plenty of ways to be successful with a VA in another time zone.

In our digital era, the world has become a much “smaller” place. With virtually unlimited information and entertainment available 24/7, we’re all exposed to more and more diversity every day. Basically, people around the world are getting more familiar with each other.

Also, in the countries where the virtual assistant industry is rapidly growing, such as India and the Philippines, English as a second language is very common and many are highly proficient speakers of the language. In fact, the Philippines has two official languages: Filipino and English. (The Philippines is fourth, behind the U.S. India, and Pakistan, in its number of English speakers!)

And as far as Filipino culture goes, it’s a blend of both Eastern and Western influences, so its citizens have a lot more in common with Westerners than you might think! So cultural challenges in working with offshore team members, especially those in the Philippines, are becoming less and less of a challenge over time.

With certain exceptions, which we covered in the ‘how to hire’ section, any challenges in working with a team member from a different culture can be easily overcome with the right mindset and open communication.

### *Business Security*

A common concern when it comes to considering a virtual assistant is how to grant access to the business systems the VA will need to use while still protecting the security of the business. It’s a legitimate worry, as you won’t really know and trust your virtual assistant (at least at first!), yet you’ll need to allow them into the systems and information about your business. Of course, you could say this about any new employee, virtual or otherwise, yet it seems to create much more fear in the virtual environment.

Virtual assistants are likely to be honest. Otherwise, they’re not going to be in the industry for long. At the same time, just as a brick-and-mortar business might limit access to certain programs and software, it’s savvy to have some protections in place, if for nothing else than your own peace of mind. Fortunately, there are many ways to reduce the risk involved and protect your business. Let’s take a look.

### *Develop Clear Data Security Policies*

If you’ve been working solo or with a small local or familiar team, you’re not likely to have already developed policies around security (or maybe much else for that matter!). It’s pretty common sense for employees, including VAs, to grasp their need and responsibility to protect your data, but it’s smart to have a policy and to make your expectations clear and specific

As you're documenting your business processes, add a policy for data security, information privacy, and anything else that might be relevant to the security of your business. Also, as your recording and documenting tasks you'd like to hand off to your VA, think about what access they'll need to perform each task. Some programs have levels of users, where some users have full access to all capabilities, while others can perform limited functions within the platform. Within systems like that, you can block access to anything they don't really need.

Make sure you keep a record of what your VA does and does not have access to so that it will be easy for you to recall what they can access, as well as to change settings or otherwise take away access should something go wrong.

### *Look at Business Security Systems Options*

Sometimes business owners aren't aware that there are alternatives to giving providing their virtual assistant with their own login credentials for their accounts. For example, they share give the VA their own username and password to their business website, allowing the VA to essentially log in as the business owner.

The trouble with giving away your logins and passwords is that the VA has that information, and you'll be scrambling to change them all should something go wrong or your VA moves on to another opportunity. (Think of what a pain it is when you try to log in to one of your accounts and you have to reset the password because you forgot it or because the software forces periodic updates. Now imagine that times all of your passwords!) Also, your login will include complete administrator access to any system, and that's not always ideal.

For every one of your systems, you'll give the VA access to, provide them with their own username, being sure to look at the user options you can assign to their access. VAs should definitely have their own accounts, and it's preferable if you set up those accounts so they are restricted to only the functions the VA needs to get into. For example, Facebook has several options for page roles, including administrator, editor, moderator, and analyst, and each has things they can and cannot do. It will be much simpler and safer to simply revoke access or delete an account in a system, rather than having to update all of your passwords.

In many of these tools, having unique user IDs means that you can also track what other users do in your software. You can see if they appear to be doing anything that is not within the scope of their job.

Another point here is to look at tools or software which include version control with them. Version control allows you to see what has changed and to revert to previous versions at various points in time. For example, both Microsoft Word and Google documents allow you to view earlier versions of documents.

### *Use a Password Manager*

For any tools where you can't create a separate account, or where the work simply requires the VA to go in "as" you, you should use a password manager, such as LastPass. Password managers allow you to grant access to your online systems - from social media platforms, CRM and project management tools, to your business email accounts, and your cloud storage drives - and log in as you, without giving them your passwords. A password manager like LastPass stores your username and password combinations safely in your app account. When you want to revoke access, you simply go back into the sharing feature within your password manager and withdraw it.

As a bonus, LastPass will tell you when your passwords are weak, it will detect when you're using the same credentials on multiple platforms, and it will suggest and manage those super secure passwords that are basically random assortments of letters, numbers, and symbols!

### *Use of Credit Cards*

If you want to have your virtual assistant place orders or book events, you'll have to provide them with a way to make payments. However, you should never hand over your credit card details for a variety of reasons.

For one, the fine print of most credit card contracts includes conditions that nullify your fraud protection if you have shared your details and experience fraudulent transactions. That means that even if your credit card is stolen - and the fraudulent charges weren't made by your VA - the credit card company can stick to their fine print and not investigate and reverse those charges!

If making payments will truly be a routine need for your VA, you have some alternatives, including:

- Getting them a card, in their own name, on your business credit account.
- Nominating your VA officially to have access (you'll need to check with your provider as to whether they will allow this. Make sure they know the VA isn't an employee where they are a contractor or hired through a third-party company).
- Getting a prepaid card just for the VA's use, which will automatically cap what they can spend.
- Granting them access to a card with limited available credit.

### *Use Copyrights and Patents*

If you've created proprietary tools, systems, and branding, protecting your intellectual property is likely to be of importance. As such, it's a common concern, as a VA will often gain intimate knowledge of the inner-workings of your business. It's therefore important to take steps to protect your intellectual property through copyrights, trademarks, or patents. This at least gives you a paper trail and some legal footing should you need it later.

Keep in mind that, when you're working across international borders, enforcing intellectual property claims is always easy or effective. We recommend speaking with an attorney who's qualified to speak to intellectual property law, as their application often depends upon the country that you live in.

Overall though, if it's something that you qualify to have, it tends to be better to have security policies like this than not.

### *Use Non-Disclosure Agreements (NDAs) and Non-Compete Clauses (NCCs)*

An NDA (non-disclosure agreement) helps you to have some legal recourse if your VA were to share any proprietary information from your company with anyone else. The agreement basically asks them to keep your "behind-the-scenes" confidential, and not share your client lists or any other vital business information.

An NCC (non-compete clause) is sometimes referred to as a CNC (covenant not to compete). Asking an employee to enter a non-compete agreement means they will not go work for a competitor or start a competitive business of their own when they terminate their work with you. Typically, they bar the employee from competing with you and/or working for a competitor for a finite period of time after they stop working with you. The purpose behind these agreements is to stop them from gaining a competitive advantage over you by using the intimate details of your business.

NCCs generally last for a limited amount of time, and they may also be limited to specific geographic areas. Courts tend to uphold NCCs as long as the limitations included are "reasonable." Asking someone to never compete with you in the future would be a limitation the courts would consider to be unreasonable.

## *Do Your Homework on Virtual Assistant Providers*

The best security measure you can take is to do your homework before you find and hire a virtual assistant, rather than merely building in protections once they've come aboard. If you want to go with a freelancer – and you're therefore hiring on your own – don't fail to check candidates' work history and references.

You want to ensure you speak with people who can verify work history, reliability, and performance levels. It's a good idea to also invest in some background checks. If you intend to search for freelance candidates through platforms such as Upwork, the candidates there will have ratings and reviews, but be aware that they can be fakes and don't rely solely on reviews to vet a candidate. Be sure to connect with at least one real person who can speak on the candidates' history, experience, and work ethic or habits.

If you're new to hiring team members, this can be a bit time-consuming and even a little intimidating. Searching for candidates through a third-party, virtual assistant company can save you a lot of legwork, but take a little time to research the VA companies you consider. Just like VAs, they're not all created equal. You'll want to know if the company has security policies in place to protect its clients and if they receive good reviews from their clients. Most reputable companies NDAs and contracts which bind them to information security and confidentiality rules built into their placement services, but you'll want to verify that. You may also want to ask to see the agreements in case you have a specific clause you'd like to include. A good, reputable company will accommodate your needs.

Another layer of security can be added when you hire through a VA company where your VA will be under the direct supervision of that company. For example, at The Virtual Hub, our VAs are all grouped into teams where quality assurance is monitored and ideas are shared. It creates an ecosystem of accountability and productivity, designed to protect clients and give them the best possible experience.

Fears over the security of the business are a common obstacle that prevent owners who need help from jumping in and hiring a virtual assistant. And we get it. Securing your business should be a concern, but it shouldn't be such a worry that it prevents you from getting the help that you need. By simply putting a few precautions in place, your business will generally be as safe as with a virtual team member as any business would with an in-office employee.

# Hiring VAs for Larger Companies and the Ultimate Profit Maximizer

## **VAs for larger companies**

What we've shared here about virtual assistants has been primarily focused on solopreneurs and small businesses who are looking to hire their first team member. But VAs aren't just for small companies, and they're definitely not just for virtual businesses!

### *Businesses of all sizes use Virtual Assistants*

In fact, larger companies, including those in America's Fortune 500, have been outsourcing entire, non-core business processes for decades and various professional roles for decades. For example, a tech company could outsource its customer service function in order to focus all of their efforts on creating innovative electronic solutions. That same tech company might also add an overseas developer to its team in order to tap into a larger talent pool.

More recently, these same large companies are beginning to embrace the idea of virtual employees for performing a variety of administrative tasks, as there are tons of benefits to outsourcing admin activities. Of course, there is the money saved on office space, equipment, and other costs associated with placing someone onsite - and on the payroll. In addition, studies have shown that virtual workers tend to actually be more productive and more engaged than their colocation counterparts. Plus, recruiting for and selecting a virtual employee can often be done in a matter of days rather than the weeks typically needed to fill an in-house position, allowing companies to hand off admin tasks much sooner.

### *Growing a Virtual Team*

If you're just beginning to create your team and are hoping to grow into a larger company, we have good news. The hardest step is getting and learning to manage your first virtual assistant. Once you've tackled that, growing your team to include three or four VAs is relatively simple, provided that you continue to use the same effective strategies and structures we've presented here.

The next hurdle you're likely to face is when your business grows to the point where you require five or more VAs. Single-handedly managing a team of five or more basically becomes untenable. You hire a team to allow yourself more time in your genius zone, but with



a team of that size, you'll instead end up spending too much of the time you save on the tasks on managing the team.

When you grow your business to that size, you'll be entering a new realm of team dynamics and management, specialization, and delegating not just tasks but the management of others. For example, many entrepreneurs with a team of VAs will hire an online business manager (OBM) to manage the work of the VAs, and the OBM manages the VAs, and the business owner oversees and collaborates with the OBM. Alternatively, a business owner might have a virtual assistant who has other virtual assistants working under him or her. For instance, a company might have a VA who specializes in social media management oversee a VA who creates graphics and another that automates scheduling the content.

### *What's Possible with Virtual Assistants*

When you're adding your first team member, the idea of growing and managing a larger team might sound completely overwhelming. However, once you get up and running with your first virtual assistant, and you see how much more productive and effective you and your business can be, it won't be long before you're looking to add a second and third VA.

For one, the first VA is going to help you make time to grow your business, which means there will be more work to be done - which means you need more help to do the work! On top of that, you're going to get "addicted" to the feeling you get when you stop doing tasks you hate or aren't great at, and you're going to discover more and more things you want someone else to do. You'll realize how adding virtual team members can both accelerate your business growth and allow you to free up your time to do what you do best in your business, as well as allow you more time outside of your business.

Wow! Are you surprised there's so much to learn about virtual assistants, what they do, where to find them, how to work effectively with them, and which types of businesses (hint: all of them!) can benefit from them?

Because virtual assistants are so affordable and effective, and they free up so much of your time (or your other team members' time), offloading tasks to a VA allows everyone to make more money - even without launching any new products or services! But only if it's done right.

If a company recognizes the value of virtual assistant services, but fails to prepare, onboard, train, and oversee them, they won't reap the huge benefits. No matter how cheaply they hire, it will be a waste of money rather than a profit driver if it's done ineffectively.

Companies who follow the guidelines and recommendations we've presented here - and we think we've covered just about everything - will maximize their potential for success in adding virtual assistants to their teams.

At first, it may feel like adding a VA is setting you back, rather than pushing your business forward. Know that it's temporary! Yes, there is a time investment at the beginning, but the time you invest in getting this right will result in reaping the highest rewards later, in terms of profit and overall business success - not to mention personal wellbeing when you finally get to step out of overwhelm and build a more sustainable business!