



Client Guide

HOW TO GET THE MOST
OUT OF WORKING WITH
YOUR VIRTUAL ASSISTANT

A PUBLICATION OF



● YOUR DECISION

WHY CHOOSE US?

YOUR VIRTUAL ASSISTANT HAS BEEN IN BUSINESS SINCE 1998, WORKING WITH A NUMBER OF CLIENTS ACROSS A VAST RANGE OF INDUSTRIES.

We're a team of specialists, each with our own unique talents and skills. Over the years, we've developed quality control processes to minimise errors, refined how we communicate with our clients, and fostered a strong culture of support within our team. When you partner with us, you're not just working with one Virtual Assistant; you have an entire office working behind the scenes. And you get the benefit of our experience – the best tools to use, mistakes we've learnt from, and initiatives that have helped leap frog our clients ahead of their competitors.

SO WHY YOUR VA?

- We've been around for nearly 20 years and we plan on being around for the next 20+ more.
- We want to work with you. When you succeed and take your business to new levels, we grow with you.
- We have experts that can help you in the areas you need. No need to communicate with a myriad of people. Talk directly to your Senior VA, and we'll find the people you need.
- Finally, we're a fantastic team of people. We're fun to work with, talk to, and bounce ideas off. We care about the relationships we build with you and with your team.

This guide will take you through how to get the most out of working with us.

You've worked hard to build your business and I know you'll have concerns about bringing someone new into your team. That's why it's so important you choose carefully. Do your homework, ask around, and talk to a number of VAs. Put them to the test; send them a non-critical task and compare how easy it is to communicate with them, how quickly they turn your task around, the questions they ask and ultimately, the quality of work they return to you.

● HOW IT WORKS

**CONNECT
WITH US**

The On-boarding Process

We'll take you through the working with us process, to make your outsourcing journey a stress-free one...

DISCOVERY CALL WITH JUSTINE

We'll discuss your needs and establish whether we'd be a good fit for each other.

WE'LL SEND YOU THE START-UP INFO

Taking care of your confidentiality and IP, access to our project management system, the right package for you and some tips on working with us. We'll also ask you to fill out a quick questionnaire, so we get all the information we need to support you.

STRATEGY SESSION WITH JUSTINE AND YOUR DEDICATED VA

We'll go through your priorities, make sure we have all the info we need to get started and set expectations.

WE GET BUSY!

Work starts and you get to tick items off your to-do list and spend time focusing on the areas of your business where you add the most value.

MONTHLY REPORT

You'll receive a monthly progress report which outlines time on task, comments from both Justine and your senior VA, upcoming projects and our monthly 'added value' task.

Our Senior Virtual Assistants

Our team of senior virtual assistants have been selected based on their experience, skills and most importantly, their personality.

A successful virtual relationship relies on the ability to communicate well and to be proactive in understanding your needs. Each of our VAs brings with them a particular skillset while being outstanding executive assistants and project managers.

When signing up to join our team, each new VA goes through a series of tests, reference checks, and works under a senior VA before being paired up with clients.

Our [job description](#) clearly sets out our expectations of their responsibility to you.

Communicating projects

Talk to us via email or directly in Proworkflow, our cloud based project management system.

In Proworkflow we'll store all of the information needed to complete the tasks, allocate the project to a VA, track time, upload documents and send messages.

Help us to achieve the best outcome for your project, by answering these questions up front:

- What is your deadline or the priority for this task?
- What documents, logins or other resources are needed to do the task?
- Have these been supplied?
- What particular instructions do we need to follow or know to complete the task?
- What outcome are you aiming to achieve with the task or project?

By relaying as much as possible of the above to us, you help reduce email overwhelm while making sure we are clear about what the project entails.

Communicating your brand

If you have a voice and a brand guide, please share it with us as we begin our journey together.

This helps us to communicate with your clients and team in your 'voice', it ensures we use the correct colour palette and logos both online and in your documents, and it helps us to get to know your business better; a voice brand guide is a must-have for any business.

If you don't have an existing guide, add it to your wish list as a priority and we'll work with you to establish one. You'll use this to easily communicate requirements to your suppliers, affiliates, staff, and designers, meaning you have a consistent brand identity throughout your operations.

Read more about [how to create a brand voice guide](#).



● HOW CAN WE HELP YOUR WISH LIST

Sharing a wish list with your virtual assistant helps us to work proactively.

By listing all of the areas you want help with, your VA has a better understanding of what you need. This means, not only is your 'to do' list being worked on as we take on tasks for you, those tasks you 'keep meaning to do' are documented and will be carried out either as we have spare time in your package or as deadlines come up.

ACTIONS:

WRITE DOWN everything that needs doing that isn't currently being done, or is being done by you that you'd like to outsource.

PRIORITISE your wish list and include dates you would like these items to be handed over by (if a routine task) or completed by (if a project). This helps us to manage your workload and we'll often complete some of the smaller items if we have time up our sleeve in your monthly package.

SHARE the wish list with us. We'll put the tasks in our project management system so they're tracked.

DISCUSS the outcomes of these tasks with your VA, especially for the top priorities. Identifying outcomes helps us to deliver what you need, in many cases coming up with suggestions you may not have thought of. If a top priority is to have an online resource library, possible outcomes could be adding value for your clients, eliminating replication of documentation, and improved internal communications.

MONITOR the wish lists as items are completed or as your needs change. Ask us to make a note to Skype or discuss your wish list periodically. We'll also report what we've accomplished in your monthly progress report.

Celebrate what is achieved. Keep going!

Your Operations Manual (or SOPs)

You do need to spend time to make time, and transferring tasks from your desk to ours does take time. As we learn your routine tasks, we'll document them in an Operations Manual and share these with you.

WHY?

If you decide to take on someone in-house later on, our hand over to them will be much easier as all your operating procedures will be documented and can be used as a training resource.

Your SOPs are part of your IP and part of your company's assets. By documenting and sharing these with you, your operations manual adds value if you ever decide to sell your business.

If your senior VA is sick, has a family emergency, or (gasp) has a holiday, we provide full cover. These procedures are invaluable to us in ensuring minimal disruption for you.



Effortlessly Manage Your Business

WANT TO KNOW MORE?

Read [Effortlessly Manage your Business](#): a comprehensive resource that details how you can grow your business and free up your own time.

This complete guide to working with a virtual assistant covers:

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

YOUR VIRTUAL ASSISTANT

Experience how fast your business moves forward with the RIGHT virtual assistant.

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