



# Effortlessly Manage Your Business

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

A PUBLICATION OF

YOUR  VIRTUAL ASSISTANT

# Inside Your Guide

	PAGE
○ Before partnering with a VA	4
○ Business Planning Pre-work	5
○ Definition of a Virtual Assistant	6
○ Outsourcing Options	7
○ Getting the best from your VA	8
○ Your Story	9
○ Brand / Voice Guide	10
○ Collaboration & Communication	11
○ Systems & Procedures	14
○ Feedback	16
○ Being the Best You Can Be	17



● EFFORTLESSLY MANAGE YOUR BUSINESS

YOUR  VIRTUAL ASSISTANT

## THE OUTSOURCING JOURNEY

Simon is the successful and busy owner of a corporate coaching business that turns over in excess of \$1m a year

He has high expectations of himself and his team; he gets results for his clients because of these expectations. His business has come to a phase of change. He wants to start offering his clients online programs in order to reach more people. He's currently turning all but his A-list clients and keynote presentations away.

Simon has recognised he needs to increase his team and manage his own time more carefully. He heard about us from a colleague and booked his discovery call.

This e-book will take you through Simon's outsourcing journey with us.

## BEFORE PARTNERING WITH A VA

### YOU'VE DONE AN AMAZING JOB ALREADY

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

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

Now you want to move your business to the next level, but you're going to need a hand. That's where we come in and you make the transition from 'chief doer' to 'chief manager'!

#### In this eBook we'll show you:

- What you need to do **before** you partner with a VA.
- How to find the **right** VA for you.
- How to get the **very best** from your VA.
- And how to be an even **better entrepreneur**.

## BEFORE PARTNERING WITH A VA

### Business planning pre-work

Sharing your goals and your vision with your VA will enable them to become a forward-thinking partner in your business. To help you get started, think about the following:

- Putting a business plan in place.
- Identify your goals
- Know your financials
- Know exactly what your strengths and weaknesses are
- Draft your 'perfect' job description, what **you** should be spending your time doing
- Draft a list of what you should be (could be) delegating to your VA
- Finally draft a list of activities, tasks and projects that should be happening but aren't yet!

### IF YOU HAVEN'T DONE ALL THE ABOVE DON'T WORRY!

Your VA or Online Business Manager will work with you to help you with this pre-planning stage. The above actions help clarify expectations, the journey ahead and outcomes you're looking to achieve. *You don't start a new meal without a recipe to guide you, your business is no different.*

## DEFINITION OF A VIRTUAL ASSISTANT

You've already identified that in order to reach your goals you need to delegate. You need to manage your business and stop doing the tasks that are holding you back from working in your genius zone.

*What exactly is a VA?*

*And how do you go about finding the right one for you?*

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

At Your VA, we believe the ideal VA is someone who has your big picture in mind, rather than simply the task at hand. Someone who thinks on their feet, is proactive rather than reactive - essentially a partner in your business.

## DEFINITION OF A VIRTUAL ASSISTANT

### Outsourcing Options

#### OPTION 1: A PREMIUM VIRTUAL ASSISTANT TEAM

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

#### OPTION 2: A SOLE VIRTUAL ASSISTANT

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

#### OPTION 3: OUTSOURCING SITES

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

## GETTING THE BEST FROM YOUR VA

### Back to Simon's Journey

#### THE OUTSOURCING JOURNEY

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

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

I had the ideal senior VA in mind for Simon, and included their profile along with an invitation for the invite for our next meeting where he'd meet his new right-hand (wo)man to discuss expectations, priorities and the information she needs to start making a difference for him.



## GETTING THE BEST FROM YOUR VA

### Your Story and Company Background

#### YOUR NEW VA IS NOW PART OF YOUR BUSINESS

Knowledge is power and as part of your team, the more your VA knows about your business, the more value they can add to it and the quicker they will be able to make a difference to your day and your goals.

##### Types of information you could share are:

- Business Plan
- Mission and Vision Statements
- Company Profile

● EFFORTLESSLY MANAGE YOUR BUSINESS

## GETTING THE BEST FROM YOUR VA

### Your Brand (Voice) Guide

When communicating across all areas of your business, it's essential your VA uses the correct and consistent word, tone and brand for your business.

Having your logos, fonts and colour palettes clearly laid out in one document will help your VA be consistent in all of your documents, communication and online.

This is also a guide you can share via your VA with other contractors, team members, suppliers and partners. A brand guide will save you and your team time while ensuring your company brand is always consistently represented.

### THE OUTSOURCING JOURNEY

Simon prepared for our next meeting by sharing his company information.

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

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

● EFFORTLESSLY MANAGE YOUR BUSINESS

## GETTING THE BEST FROM YOUR VA

### Collaboration & Communication

While getting to know the tools you love to use, we'll introduce you to some of our favourites.

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

Clear and regular communication and collaboration between you and your VA (and you and your wider team) will save frustration, misunderstandings and help to build your relationship and keep momentum for the years ahead.

YOUR  VIRTUAL ASSISTANT

#### THE OUTSOURCING JOURNEY

Simon and his VA talk weekly via Zoom

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

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

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

## GETTING THE BEST FROM YOUR VA

### 5 Tips for Great Collaboration

#### 1: LOGINS

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

No more 'one password fits all'!

#### 2: SHARE DOCUMENTS

You can work anywhere, anytime, from any device, with a team based anywhere in the world using tools like Dropbox, Google Drive or OneNote.

#### 3. PROJECT MANAGEMENT

Our cloud-based project management tool is Proworkflow. It's super simple to use and it enables us to store all the files, tasks, due dates, tracked time and discussions within the appropriate project. We use it for everything from ongoing, open-ended projects (e.g. content marketing) to one-time, fixed-date projects (e.g. lead magnet type campaigns).

Other popular PM tools our clients are using include Asana, Trello, Basecamp, Wrike and Workflowmax.

## 4. COMMUNICATIONS

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

## 5. SHARE WHAT YOU SEE

Try [Loom](#) for sharing video screenshots with your VA. This can save you time as you quickly and easily share what you see, rather than trying to describe it in an email. We use Loom a lot both with clients, as part of our SOP's and internally as a team.

## GETTING THE BEST FROM YOUR VA

### Your Systems and Procedures

Having documented procedures in place helps your VA both pick up your tasks quickly and easily during the handover, and find efficiencies and determine how to make your processes even better once they get to know your business.

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

#### Benefits of a procedures (operations) manual are:

- Adds value to your business.
- Documents your intellectual property.
- Reduces training/induction time both now and in the future.
- Reduce your dependency on your VA and/or team members.
- Helps to identify areas for improvement/increased efficiencies.
- Ensures consistency and best practice across your business operations.

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

1. Identify the task you are going to outsource.
2. As you perform the task record what you do in [Loom](#) or create an SOP.
3. Send the SOP through to your VA to carry out and ask her to clarify anything she needs more information on.
4. Don't forget to communicate:
  - a. The desired outcome of the task.
  - b. Deadline and frequency of the task.
  - c. Any additional resources needed to complete the task.
  - d. Your expectations.
5. Discuss where you want your procedures stored, how they are to be shared, whether they are subject to document control, if you want a hyperlinked table of contents, or workflow diagram which pulls your procedures together.

● NOTE

One tool we recommend for your procedures is [Sweet Process](#). This makes documenting your procedures easy (and fun!); you can share procedures as your team grows and monitor the work done by procedure.

## GETTING THE BEST FROM YOUR VA

### Honest, timely feedback

Possibly the most important part of your Relationship!

Whether it's good or not so good; it's critical you are honest and forthcoming with your feedback so you and your VA can evolve, improve and change as your business changes.



## GETTING THE BEST FROM YOUR VA

### Being the best you can be

Now that you and your VA are working seamlessly together, what's next?

The first priority is to look at the time you've saved yourself by partnering up with your VA. Guard this time religiously! If it used to take you 2 hours each day to respond to emails and it's now taking you half an hour, block out the 1.5 hours in your calendar and protect that time from noise. This time is your investment in the growth of your company and the life balance you need to thrive.

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

By using your VA to free yourself up and then using your free time in your genius zone, you now have the ability to make your business what you've always wanted it to be. You should no longer be too busy, too tired, too overwhelmed or too stretched ... by following the steps outlined in this guide ... the world is yours to conquer!



● EFFORTLESSLY MANAGE YOUR BUSINESS

YOUR  VIRTUAL ASSISTANT

## THE OUTSOURCING JOURNEY

### Simon is managing his business effortlessly!

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

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

Two months on and we're working on launching his first online course, successfully leveraging Simon's zone of genius which is creating content to help his ideal audience grow successful health & fitness businesses.

Because we're doing what we do best, Simon now has the time and space to do what he does best.

## OUR 10 TOP TIPS FOR BEING THE ENTREPRENEUR WE KNOW YOU CAN BE

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

OUR WEBSITE >>

# YOUR VIRTUAL ASSISTANT

We do what you don't do, can't do and  
shouldn't do

FREE DISCOVERY CALL >>

MORE RESOURCES >>