

#3

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Friday, August 25, 2017 2:53:17 AM
Last Modified: Friday, August 25, 2017 3:52:31 AM
Time Spent: 00:59:13
IP Address: 43.249.199.20

Page 1

Q1 Your name

Justine

Q2 Your business name

Your Virtual Assistant

Q3 What are your business goals for this year? (SMART goals)

To increase clients on OBM retainer from 2 to 8 by 31st March 2018 by upselling to existing clients and attracting the right contractor.

To achieve 95% customer and contractor satisfaction through improvements in communication, systems and culture measured by surveys to new clients and annual surveys to contractor team.

Q4 What is your vision statement?

To become the best virtual assistant and online business manager company to work with and for.

Q5 What is your mission statement?

To champion small and medium business owners. They dream it, we make it happen.

Q6 Let's do your SWOT analysis, what are your business's:

Strengths	Strong experienced team, flexible and constantly improving, good brand in NZ
Weaknesses	Our systems and processes (internal and external), team capacity and expertise skillsets
Opportunities	OBM support in NZ (competition is poor)
Threats	Newer VA businesses are coming through offering very high service at a premium price point

Q7 Additional SWOT notes:

Respondent skipped this question

Q8 Your revenue:

What is your current revenue?

345k

What is your forecast revenue?

?

Q9 What are your income streams?

Existing:

VA packages

Possible:

OBM retainers

Q10 Where do you add the most value to your business (how should your time be spent)?

Business development and client relationships

Q11 What's the biggest frustration you have in business?

Time spent on day to day tasks, troubleshooting

Q12 What are you most proud of about your business?

Our team, it's culture. Relationships with clients.

Q13 Does your business have a typical 'busy period'? (e.g October- December)

No

Q14 What would your optimal role be in:

90 days

Spending time on tasks to improve our profitability

6 mths

Having our own OBM to take over operations

1 year

Stepping out of the business to concentrate on Hubspot partnership

Q15 Additional notes on above (roles):

Respondent skipped this question

Q16 Do you have the following:

Branded document templates	Yes
Voice & brand guide	In Progress
Resource library	In Progress
Current website	Yes
Website audit (within past 6 months)	Need Help
Marketing strategy	In Progress
Business plan	No
Operation Procedures Manual	In Progress
Social Media Profiles (updated within past 6 months)	Yes
Email systemised (Templates, Signature, Folders etc)	Need Help
Organisation Chart	Yes

Q17 Who are your customers?

Small and medium business owners, not start up. Span a range of industries and are for the most part B2B.

Q18 Where do your customers come from?

Referrals and site

Q19 Do you have a documented sales funnel? **Yes****Q20** Who are your competitors?

- | | |
|----|--------------------------------|
| 1. | Strictly Savvy |
| 2. | Offshore VA's |
| 3. | Smaller NZ VA companies |
-

Q21 What makes your company competitive? What is your USP?

We make personal connections with our clients, very friendly, very supportive. More than just does we work to become partners with our clients.

Q22 Have you done a recent competitor analysis? **Yes****Q23** How many staff or contractors do you currently have working in your business?

Q24 Within this team, note contact details, roles, strengths and weaknesses:

W: No available OBM contractors and we struggle to find idea lead VA's.

S: Those we do have are long term (particularly our core team) with fantastic attitudes and skillsets.

Q25 What software solutions do you use and for what function?

CRM - free Hubspot

Email Marketing - Mailchimp

Social scheduling - Hootsuite

Passwords - LastPass

Email and Doc suits - Google and MS

Project Management - ProWorkFlow

Surveys - Survey Monkey

Landing Pages - Instapage

Q26 What are 3 main concerns you have regarding your current business systems (if any)?

1. **It's profitability**
 2. **Team capacity**
 3. **Where my time is spent**
-

Q27 What outcomes are we working towards achieving in our first month together? (Again using SMART criteria for these goals as we need to be measurable in our reporting)

I want someone who can keep me focused on achieving my goals, keep me accountable so that by the end of our first month we've identified measurements, reporting, milestones and timeline for the next six months.

Q28 What are your immediate priorities?

Getting my OBM up and running and ensuring I do an effective and supportive handover so they can do their job.

Q29 Identify the most important thing to you about working with an OBM

Freeing up my time and complimenting my strengths and weaknesses.

Q30 Communication is critical to the success of our relationship, how do you like to communicate? (i.e. email, chat, phone, text)

Email - I hate phone!

Q31 What expectations do you have from your OBM? (e.g. Weekly catch ups? Extensive availability? Daily activity digest?)

Daily, weekly and monthly reporting (excel or a dashboard) delivered by email.

Q32 Any final comments?

Can't wait to start!
