


YOUR **VA** VIRTUAL ASSISTANT

# OUTSOURCING MADE EASY

THINGS TO DO  
1. OWN TODAY  
2.  
3.

YOUR VIRTUAL ASSISTANT  
HIRING TOOLKIT



When you're just starting out, you can manage everything on your own. And you probably have to, until you're generating revenue. As soon as that happens, things change. Priorities shift. To-do lists grow. New ideas, projects and opportunities pop up every day, all of which are left for you to juggle.

What if you had the right support to help keep you and your business not only in check but growing?

Imagine that new email campaign copy you've avoided writing for days has been broken down, researched and organised in such a way that it almost feels like you're just filling in the blanks.

Imagine you're no longer prioritising and checking off each box of your to-do list, rather it's a document that lives with someone else, somewhere else—far, far away from you.

Imagine you're no longer the gatekeeper of every new project, launch, contractor or task. Your VA or OBM is handling it all for you.

In this guide I'll show you why this role is (or will be) essential for your business and how to start delegating as quickly as today.

**“If you want to do a few small things right, do them yourself. If you want to do great things and make a big impact, learn to delegate.”**

**~ John C. Maxwell, American author**

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# VA OR OBM?

There are so many virtual support options out there today that it can be a little daunting knowing exactly who you need to hire. So, let's break it down ... we offer 3 main areas of support for clients we work with.

## LEAD VIRTUAL ASSISTANT

A Lead VA has a background in executive assistance and becomes your virtual PA. She'll take on the daily tasks and processes that are important for running your business but not necessarily focused on growing it.

The tasks that you would delegate to a General VA tend to be technical and repetitive in nature, such as managing your emails or travel schedule, scheduling your appointments, data entry, research, scheduling posts on social media, and so on.

## EXPERT VIRTUAL ASSISTANT

An Expert Virtual Assistant is someone who has a very specific skillset and is better suited to owning and/or overseeing a very specific process in your business.

Tasks such as graphic design, email campaigns, bookkeeping, video editing, websites, social media strategy and ads for example are better suited to an expert VA.

In our case, clients have the option of delegating these tasks via their Lead VA or working with one of our experts directly.

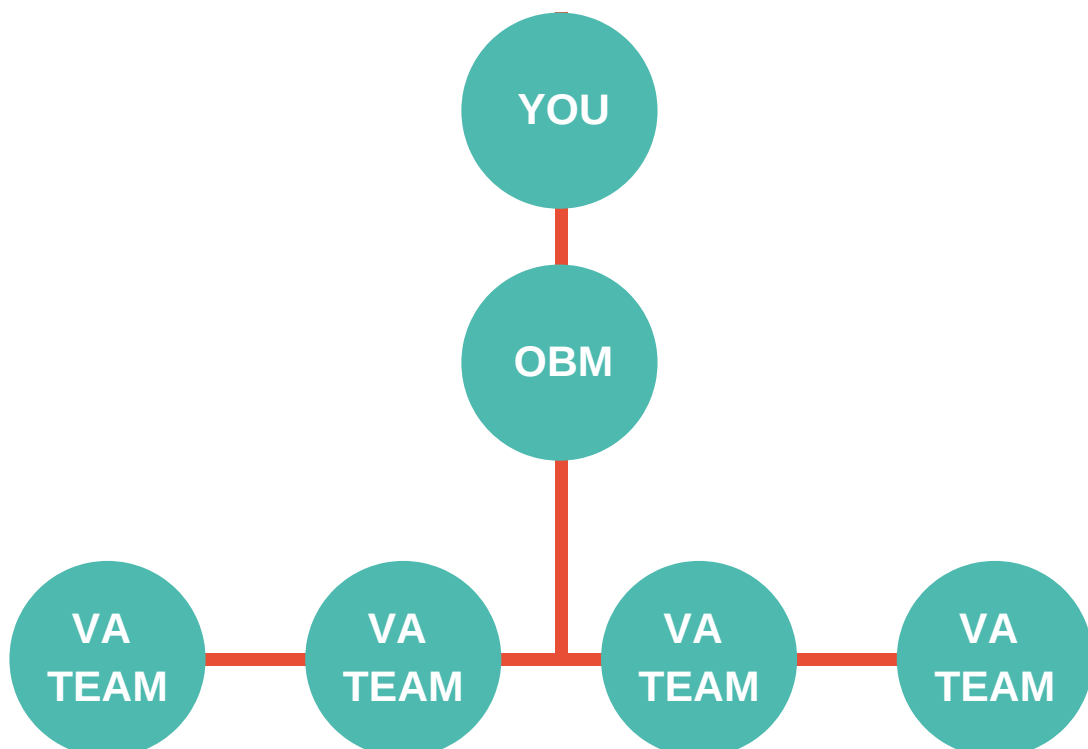
# VA OR OBM?

## OBM (ONLINE BUSINESS MANAGER)

Also known as an Integrator or Project Manager, this role takes the operation of your business from you. OBM's are outcome-focused, whereas a VA will generally be task focused, and it's their role to assist you in the growth of your business.

Your OBM will be focused on managing your projects and meeting the desired outcomes. From hiring the best contractors through to testing and quality control, it's the goal of your OBM to take the management of all your ongoing projects (whether they be marketing, financial, operational or otherwise) so you can focus on the vision.

With an OBM on your team you're free to concentrate on the activities you're good at and enjoy doing, that have a direct impact on your income.





# **5 SIMPLE STEPS TO WORKING WITH YOUR VA**

# The 5 Step Process

## Document Tasks

Make a list of all the tasks and processes you want to delegate to your VA.

STEP  
01



STEP  
02



## Job Description

So you're clear about who you're looking to bring into your business.

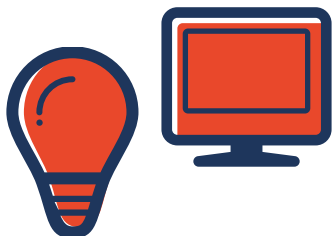
STEP  
03

## Finding your VA

How to find and hire the best fit for your business.



STEP  
04



## Testing your VA

Before making your final choice test your top 3 candidates.

STEP  
05

## The Trial

Before you commit, finish your search with a trial period.

# STEP 1

## DOCUMENT THE TASKS YOU WANT TO OUTSOURCE

Start by making a list of all the tasks and processes that you plan to delegate to your Virtual Assistant. Assuming these are tasks that you're already doing yourself, create training documents (aka Standard Operating Procedures) for these tasks. To learn how to write effective Standard Operating Procedures, [download this free guide](#).

If you're hiring an Online Business Manager, document the outcomes you want them to accomplish instead of specific tasks or procedures.

### TIP:

We've had SOP's from clients in a variety of formats. Investing in good procedures now will save you time in the future but don't get caught up on them. For example, the following format won't take you long and is easy for your VA to follow:



- VIDEO: Use LOOM to screenshot yourself doing the task, then simply send the URL to your VA who can add the video to an SOP template.



# STEP 2 CREATE A JOB DESCRIPTION

Once you have your list of tasks to delegate, you'll need to create a job description for the role that will be responsible for these tasks.

Your job description should include:

- Background information about your business (your industry, what you sell, and who your clients/customers are)
- Level of education, experience, and/or skills required
- List of duties and responsibilities
- List of any apps, tools, or software they will be using

Here's an example of a well written Virtual Assistant job description that we borrowed from [Shopify's guide to hiring a virtual assistant](#):

### **Sample VA Job Description**

We run a 6-figure dropshipping business and receive dozens of support requests through Zendesk and Facebook every week.

We require someone with great customer service experience to help respond to tickets on Zendesk and messages on Facebook. We will provide answers to the most common questions we receive. From time to time, the candidate may be required to log into our Shopify store and look up orders, make changes to orders, or provide refunds.

Ideally, this candidate has experience with ecommerce, a dropshipping business, and Shopify. Experience with Oberlo is an asset.

#### **Duties include:**

- Checking messages on Facebook, answering questions
- Responding to and solving support tickets in ZenDesk
- Solving customer problems such as a change in their order
- Solving customer inquiries such as the status of their order, how long before their shipment arrives, etc
- Looking up orders in Shopify / Oberlo when required
- Moderating comments on Facebook posts, hiding complaints, deleting slander

#### **Qualities needed to be successful:**

- Excellent English comprehension and writing ability
- Courteous and compassionate customer service
- Problem solving ability
- Zendesk experience
- Facebook experience
- Shopify experience
- Oberlo experience is a plus
- Experience with a dropshipping business is a plus
- Interest in yoga is an asset (our industry that we serve)

**Other Skills:** Customer Service, Customer Support, Shopify, Social Media Management, Zendesk



## TIP:

If you're not sure of the duties and responsibilities yet that's ok; try one of the actions below and build on this as you build your relationship with your VA. It's ok to start with one task!

**Option 1:** Highlight in your *150 Tasks you can Delegate to a VA* guide which tasks you're looking to outsource and include these.

**Option 2:** Track your own tasks over the next week. Write down everything you do. At the end of the week review your list and delegate tasks you've identified as categories 2, 3 or 4 from the list below.

**Option 3:** Identify 1 task you know you need a VA to do now and send the SOP for that task to your chosen VA.

Every task and process in your business belongs in 1 of 4 categories:

1. **Tasks that you should do:** high-value tasks that you enjoy doing and you're actually good at.
2. **Tasks that you should not do:** low-value tasks that are not the best use of your time, even if you're good at them or you enjoy doing them. (These are the hardest ones to outsource!)
3. **Tasks that you don't want to do:** tasks that you don't like doing, but that someone else will.
4. **Tasks that you can't do:** tasks that you lack the necessary knowledge and skills to do properly.

# STEP 3

## FIND AND HIRE YOUR VA OR OBM

Hopefully you're already convinced we are the virtual team you've been looking for! In the off-chance that you're not quite convinced, here are some ways to find and hire the best fit for you and your business:

- For a low cost option consider posting your JD on some of the offshore outsourcing sites such as [www.guru.com](http://www.guru.com), [www.fiverr.com](http://www.fiverr.com) or [www.virtualstafffinder.com](http://www.virtualstafffinder.com).
- Post on your social network channels with your JD attached.
- Reach out to your connections and groups, asking for recommendations.

Once you've shortlisted your preferred applicants, arrange for a face-to-face via Zoom or Skype. Personality is as important as credentials so listen to your instincts. Does the conversation run easily, do you feel a connection, did they listen to you and ask the right questions, did they impress you with what they did say?

When we **outsource offshore** on behalf of our clients through Fiverr, Guru etc. we have a process we follow to minimise any risks. I'm happy to share this SOP with you (simply email or DM me).

When we take on **new contractors** we take them through an onboarding process which covers our expectations, reference checks, tests and a trial period. Again, I'm happy to share this SOP with you.

# STEP 4

## GIVE YOUR TOP CANDIDATES A TEST

Before you commit to hiring your VA or OBM, give your top 3 candidates a task to complete as a test.

Pick a type of task that would be a part of their regular responsibilities, and see how well they perform this task.

Often, people that look great on paper are not so great in real life. Asking your candidates to complete a real task will help you determine who the top candidate really is.

You're looking for:

- how they communicate with you
- what questions they ask
- turnaround time
- output

*When we test as part of our onboarding process for VA's wanting to join our own team, we keep our tasks slightly open to interpretation to measure how the candidate thinks. Some examples of our internal tests are:*

- *Repurpose a document as a PowerPoint presentation.*
- *Create a Facebook post sharing one of our blog posts.*
- *Format, edit and optimise the document as a blog post.*

# STEP 5

## GIVE THE BEST CANDIDATE A TRIAL

Choose the best candidate for the job and start them off on a trial period. A trial period gives your VA additional incentive to do a great job for you, knowing that it will lead to a permanent role on your team.

Have them sign a formal agreement to avoid any discrepancies in the future.

*Note: if you're contracting a virtual assistant or any contractor for your business, please ensure an agreement is in place where it's clear they are a contractor, not an employee. This advice is based on a client who employed a contractor without an agreement and had a personal grievance filed against her when they parted ways through no fault of the client.*

# TOP TIPS

## FOR WORKING WITH YOUR VA OR OBM

Hiring a Virtual Assistant or Online Business Manager is just the beginning.

Once you've added someone to your team, part of your job as a leader is to help maintain a productive, professional and mutually beneficial relationship with your staff.

We cover how to get the most from working with your virtual team in our free guide, *Effortlessly Manage Your Business*.

“One of the things we can do to avoid burning out is to become more effective delegators. At first, it's hard letting go, but trust me folks, once you start letting go of the steering wheel a little, you'll want to hire a full-time driver sooner or later!”

~ Chris Ducker

# TOP TOOLS

While the concept of hiring someone that you may never meet in person seems daunting, with the right tools you can build and maintain productive and close relationships with your virtual staff.

The main categories of tools required to work effectively with Virtual Assistants and remote team members are communication, project management, file sharing and security (password protection). I've listed some of our favourite tools for each category below.

If you want to learn about even more programs and tools to help you run your business, check out our list of the top tools we use in our [Business Manager's Toolbox guide](#).

## **Communication Tools:**

- Skype
- Zoom
- Slack

## **Project Management Tools:**

- Trello
- Asana
- Basecamp

## **File Sharing & Security**

- Google Drive
- Dropbox
- LastPass



# YOUR FOCUS

If you're feeling tired and overwhelmed with building your business, you're not alone. Most clients who come to us work long hours simply because they haven't learnt how to leverage their time and delegate to others effectively.

A lot of business owners think that they can or have to do everything themselves, and because of that belief that's exactly what they do. Often at the risk of burning out.

Your job is not to create a 'job' for yourself. That's what we're for. An entrepreneur is someone that builds systems and hires people that help run their business for them.

A VA or OBM likely won't be the only person you add to your team as you grow your business, it takes a team to scale a business. But they should definitely be one of the first.

Working with a VA and/or an OBM will free up more time for you to focus on activities that have a greater impact on your life and business.

BEGIN.

Imagine what you'll achieve with a team behind you!

# NEXT STEPS

## HOW TO ONBOARD WITH YOUR VA

### Discovery Call

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

STEP  
01



STEP  
02



### Info Pack

Receive our client information pack so you can make an informed decision about working with us

STEP  
03

### Strategy Session

Your introduction to your lead VA where we discuss the info we need, your priorities and expectations.



STEP  
04




### We Get Cracking

Work starts and we concentrate on your to-do list so you can focus in your zone of genius..

STEP  
05

### Monthly Report

We wrap up each month with your monthly report where we communicate time on task, what's hot and what's not!

- 
- If the only thing you get from working with a VA is freedom to work in your zone of genius ...
  - If the only thing you get from working with a VA is expertise in your business ...
  - If the only thing you get from working with a VA is a better service to your clients ...

If you only get one of these things, it'll be worth the investment and the time to start outsourcing. But you won't get only one. You'll get them all.

**BOOK YOUR FREE DISCOVERY HERE**

or email Justine at [justine@yourva.co.nz](mailto:justine@yourva.co.nz)