

OUTSOURCING MADE EASY

HOW TO LEVERAGE YOUR NEW VIRTUAL ASSISTANT

**AND MAXIMISE YOUR
RETURN ON INVESTMENT**





THE RIGHT SUPPORT

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

And it's easy. And it works the first time!

Imagine you're no longer the gatekeeper of every project, team member, or task.

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

So you get your time back.

And your business gets the resources it needs to scale.

Sustainably and easily!

30-DAY FRAMEWORK

WEEK
1

Getting Started

WEEK
2

Communication

WEEK
3

Delegate & Elevate

WEEK
4

Review



WEEK 1: GETTING STARTED

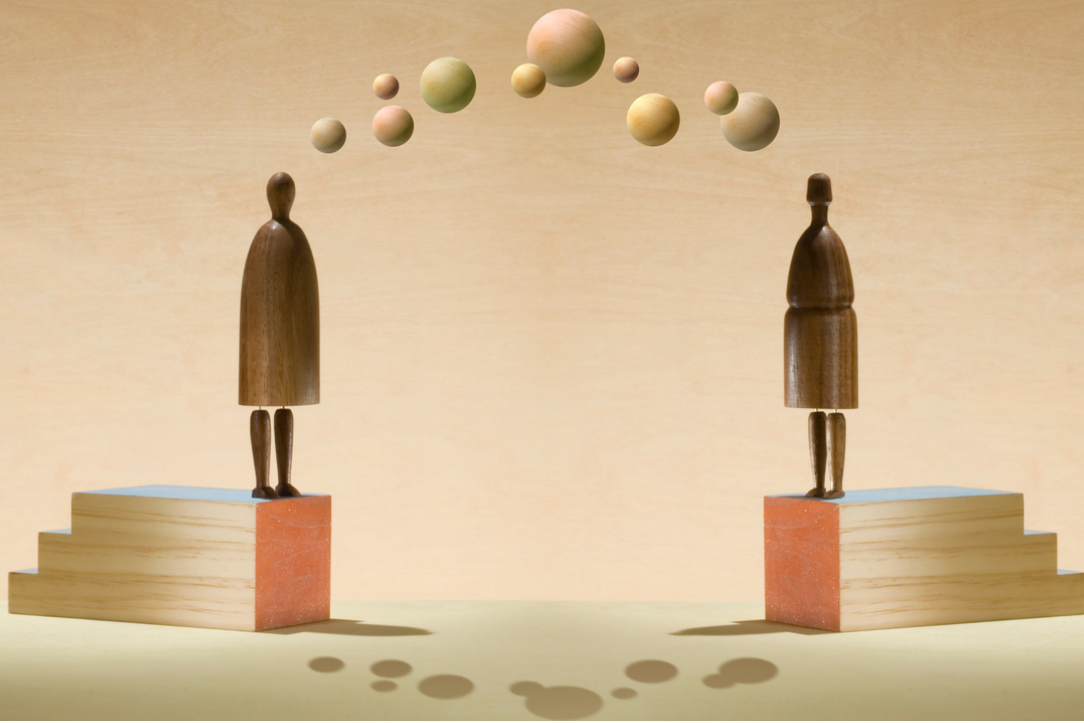
The purpose of this process is to help you get 'up to speed' and start leveraging your investment with your VA. No overwhelm, just a step by step framework to get the best possible outcome for you.

This is the framework we use to onboard the virtual assistant clients we work with, allowing them to get up to speed quickly.

ACTION: YOUR FIRST ZOOM

Your first zoom with your VA should clarify:

- **expectations:** (yours and theirs) around availability, turnaround times, preferred ways to communicate
- **priorities**
- **logins:** whether you use a tool such as LastPass to share passwords, if not your VA should suggest and set up a tool for you
- **briefs:** discuss how you will share the information on how to do the tasks (written, in your project management system already, you'll video instructions)
- **schedule a recurring check-in:** we suggest at least weekly in the first month.



ACTION: SHARING KEY INFORMATION

Share the following with your VA so they get to know more about you, your business and how best to work with you:

- Your vision and mission statements
- Your values
- Your goals (long term and short term)
- Your brand guide

If you don't have any of the above, don't worry just ask your VA to add it to your wish list (more on that later!) or they'll keep it on the radar for you.

The more you share, the easier it is for your VA to be on the same page as you!

ACTION: SHARING YOUR LOGINS (SECURELY)

If you have your own password manager we'll use that, the last thing you need is to add another tool to your tool belt!

If you aren't already using a secure manager to share logins and keep your own access encrypted, your VA will set you up with a free LastPass account (and help you use it). We use LastPass to keep our client logins safe, and because it saves time. We're all about saving time!

Your action here (if we haven't already discussed it during your onboarding zoom) is to let your VA know if you need a password manager set up for you. If not could you start sharing relevant logins with her?

For logins where you can set your VA up as a user, please do, the benefits of doing so:

- they won't have to hassle you for 2-factor-authentication or verification codes every time they login to one of your systems or tools.
- they can set up our own 2FA to keep you safe
- it's good audit tool where possible for our work to be done under your VA's name, so you know who's done what.





TIPS: HOW TO DELEGATE SUCCESSFULLY

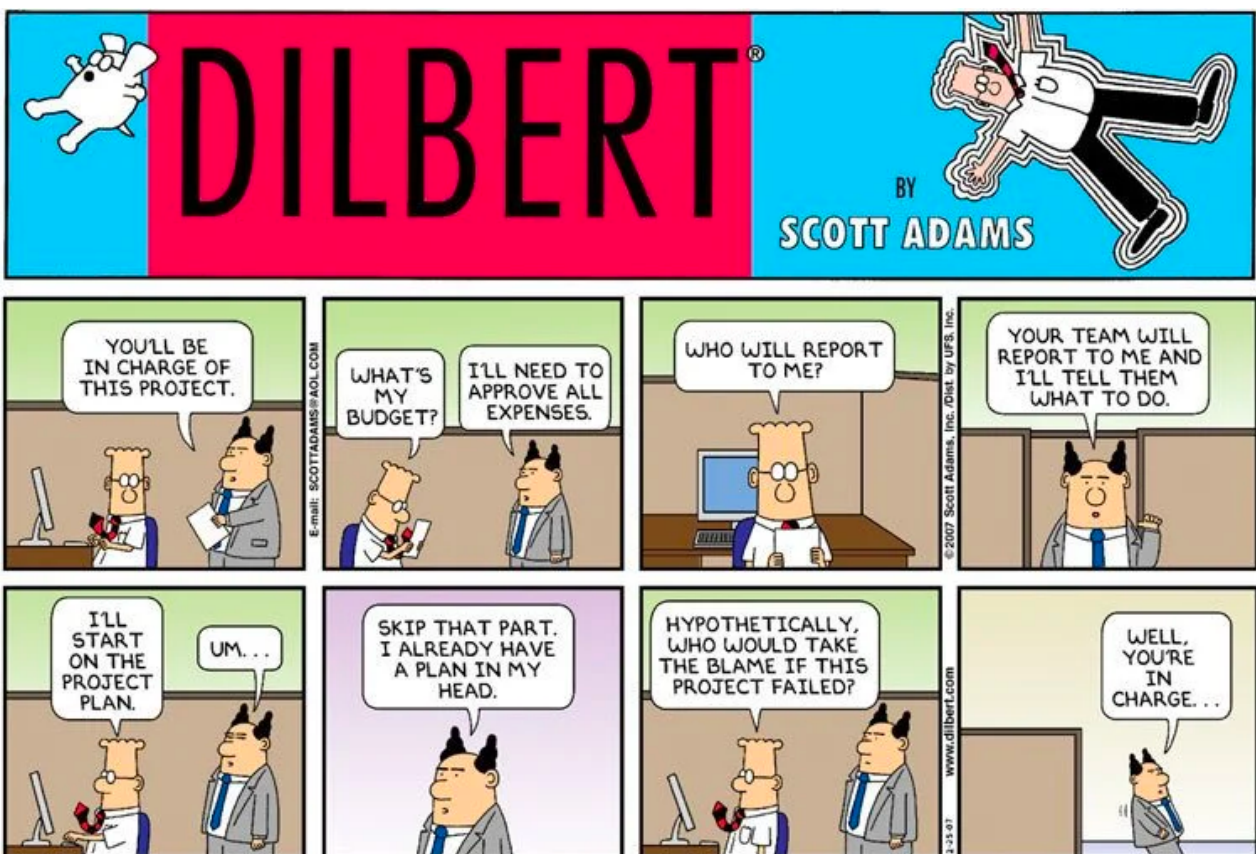
Use the following principles to delegate successfully:

- Clearly articulate the desired outcome. Start with the outcome in mind and specify the desired results.
- Clearly identify constraints and boundaries. Where are the lines of authority, responsibility and accountability? Should the person:
 - Wait to be told what to do?
 - Ask what to do?
 - Recommend what should be done, and then act?
 - Act, and then report results immediately?
 - Initiate action, and then report periodically?
- Match the amount of responsibility with the amount of authority. Understand that you can delegate some responsibility, however you can't delegate away ultimate accountability. The buck stops with you!
- Provide adequate support, and be available to answer questions. Ensure success through ongoing communication and monitoring as well as provision of resources and credit.
- Focus on results. Concern yourself with what is accomplished, rather than detailing how the work should be done: Your way is not necessarily the only or even the best way! Allow the person to control their own methods and processes. This facilitates success and trust.

- Avoid "upward delegation." If there is a problem, don't allow the person to shift responsibility for the task back to you. Instead, ask for recommended solutions and don't simply provide an answer.
- Build motivation and commitment. Discuss how success will impact financial rewards, future opportunities, informal recognition, and other desirable consequences. Provide recognition where deserved.
- Establish and maintain control.
 - Discuss timelines and deadlines.
 - Agree on a schedule of checkpoints at which you'll review project progress.
 - Make adjustments as necessary.
 - Take time to review all submitted work.

In thoroughly considering these key points prior to and during the delegation process, you will find that you delegate more successfully, with great results.

DON'T BE THIS GUY!



WEEK 2: COMMUNICATION

How we communicate has a direct impact on how successful our relationship is going forward.

Here's some tips to communicate well:

- Define what you use to communicate; for example we use Slack for messaging, Zoom for video, ClickUp for project related discussions, the phone for urgent or personal matters and email for communicating with clients and a wider team.
- Structure your emails:
 1. begin with what the email is about
 2. then the information or details
 3. finishing with next steps or the action required
- Use your project management tool (or a simple spreadsheet) to track task progress. You won't feel like you need to follow up and your VA isn't constantly emailing you progress reports.
- Celebrate individual and team wins together.
- Have a virtual water cooler; these discussions are a great way for your team to learn about each other and build a relationship around shared values and interests.
- Communicate your systems. Publish and share links to policy documents and processes so those that need to, can find them easily. Automate your routine processes such as applying for leave.



ACTION: WEEKLY CATCHUPS WITH YOUR VA

- During your onboarding you will have discussed your weekly catch-ups and how important they are. Your VA should have sent you through a recurring invite, and hopefully you've had your first two catch-ups by now.
- If you do need to cancel one, please give your VA as much notice as you can. Most VAs are pretty good at blocking out their days and if you do cancel or postpone, giving them notice means they can shift their day to be as productive as possible.
- Our own catch-up agendas look like this:
 - Review the week that was. What worked well and what could we/you have done better?
 - Review the week ahead. What do you have coming up that your VA should be aware of or can help with?
 - Review your wish list (ask your VA if you haven't started yours yet).
 - Each share both a personal and a professional win.
 - Finish with one thing you want to achieve in the next week and ask your VA to keep you accountable to it.

ACTION: THE TWO-WEEK REVIEW

Take 30 minutes and a blank piece of paper to review the following:

- What have you found easy about your experience with your VA to date?
- What has been challenging for you, or more difficult than you thought it would be?
- What return on investment do you think you could use to measure your VA by? A week from now and a month from now.
- Rate out of 10 how you've handled your handover to your VA.
- Then rate out of 10 how your VA has performed.

Share some or all of this with your VA. It's early days so this is a benchmark but noting the results, and asking yourself these same questions each month will help you to reset, get back on track (if needed), and develop clarity around how you work with together.

TIP: IT'S A WORK IN PROGRESS

The first month with your VA will very much be a work in progress. They'll rely a lot on you to help them, help you!

Your VA should err on the side of caution, checking in with you when they're not sure or need more information. This initial period is used to get up to speed with how you do things, who your customers are, and how you like things done.



One of the areas that they need to know your expectations around is 'work in progress.'

If you're using a project management tool, they should be updating their status for each task so you always know how things are tracking.

Some clients prefer the project management approach while others prefer email; a daily summary of what they've done, what they're working on tomorrow, along with any questions or notes for your attention. Some clients prefer to wait until the weekly catchup with their VA, running through work in progress then.

What's important is that your VA is working how you like to work.

There is nothing worse than having to chase someone to see if a task has been done. If that's the case with your VA (ever), clarify these expectations quickly.

Are you happy with your work in progress?

YES: let your VA know

NO: clarify your expectations

WEEK 3: DELEGATE & ELEVATE

DELEGATE TASKS, ELEVATE YOUR TIME

Skip this section if you're already delegating like a pro, using the tips shared in week 1

If you're struggling, think back to the reason why you hired your VA in the first place. *Because you needed help with those tasks you couldn't do, don't do and shouldn't do. You needed to get your time back!*

This reason alone is your motivation for making this relationship work.

Remember, you don't need to dedicate days to writing out procedures. Next time you do a task that doesn't have to be done by you, use a tool like Loom or Vimeo to record you doing the task. Remember to communicate:

- when you'd like this task completed by
- how to do the task
- any logins or documents/resources needed to do the task
- the desired outcome

The trick is to be mindful of how you spend your time, and not to let noise creep back in.



CLARITY BREAKS

A clarity break is a regularly scheduled appointment on your calendar with yourself. You define what regular is – a half hour daily, two hours weekly, a half day monthly - It's up to you. Doing it is what matters.

Next find a place to meet with yourself. This could be a cafe, a park, a library, the beach (my favourite), your garden or a quiet place in your home.

Then what? It's as simple as taking a blank pad with you. Using technology tends to become a distraction. We are tempted to just do one email or just surf the web for that one project back at work. Don't do it. Put your phone and other devices out of sight, out of mind.

Back to you and that blank pad. Stare at it and your mind will help you. The important things will surface. Ideas will pop up. Try it. You'll be amazed.

WEEK 4: MEASURE

At this stage you should:

- Start to know your new VA, building the foundation of a solid relationship
- Have delegated tasks and start to see time freed up to spend on those tasks you *should* be doing
- Have clarity around our ROI and have some measurables in place with your VA
- Be catching up with your VA regularly

MONTHLY REPORT

Depending on the VA you've chosen, you should be able to see some sort of monthly report. We use a monthly dashboard for our clients which includes:

- A summary of the month
 - what's hot
 - what's not
 - suggestions for improvement
 - added value
- Reporting on time tracked on tasks
- A chat function, for comments on the report

SAME PAGE MEETING

Now is a good time to zoom with your VA and cover:

- any issues
- your two and four week reviews (page 15)
- any opportunities coming up for you
- ask your VA for honest feedback on how they felt the month went
- your goals for this month and/or quarter (so you are on the same page)
- ask your VA to also have ready how they met the required outcomes on the tasks you delegated

NEXT STEP: BOOK YOUR DISCOVERY CALL

DISCOVER HOW WE CAN MAKE
OUTSOURCING EASY FOR YOU

LET'S DO THIS!

“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

