



The Guide to Virtual Assisting

*A complete guide to starting your
own Virtual Assisting Business*

By Jamie Drake

www.guidetovirtualassisting.com

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Published by The Brightest Side, LLC

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*Epic
journeys
require
basic
tools*

*You
already
have
everything
you
need*

Introduction

There have always been Freelancers. I have been working as a Freelancer since the day I graduated college. I have grown and changed with the technology in my field as it was created and it has been nothing short of amazing. Those of us who envision the concept of giving up the traditional idea of work and take the leap into freelance will help define what the future of The Gig Economy will look like.

It's not just the future of work that gives us the freedom to take control of our work lives, it's everything that has led up to this moment. It's the technology that we depend on now and it's the technology that is coming down the pipeline. It's the technology that our children will invent and the ground breaking, mind-blowing advances that will be made by future generations. If we keep gigging, then the next group of Giggers will benefit from what we experience and discover.

But, it's right now that I want to grow my career and it's where we currently are, at the beginning of The Gig Economy, that will determine where it all goes from here.

When you establish yourself with the right niche, branding and services from the beginning, you can start working from home as a welcomed solution for micro and small business owners. And, you can work from anywhere, at any time. Whether you call yourself a Digital Nomad, Freelance Professional, Virtual Assistant, Boss Babe or a Badass Momtrepreneur is up to you.

I'm thankful for the internet. I'm thankful for the opportunity to build my career online and be at home for my family when they need me. I'm grateful that I can be home when my kids get on and off the bus and that I can take them to after school activities, stay home when they are sick, go on field trips and still never miss a moment of work.

I'm glad I can design my own schedule and decide how much time I want to devote to my work while still taking into consideration the needs of my family. I am lucky that I live in a time when the internet provides so many ways to be creative and earn a living online which makes all of this possible.

Thank you, internet and technology, for providing me the opportunity to live my life and to take care of my family the way that I choose. I pledge to always see the positive in what technology has provided us, but also show my children how to balance its power with the beauty and necessity of being in nature. I will show my kids how to live a life that is very much plugged in to the world as well as being practiced at unplugging and spending time with the ones we love.



My Story

Family is my priority, but I also need to earn a living. I know there are many other people who feel the same way, so when I figured out a way to use my basic computer skills and free online tools to create a freelance career online, I knew I needed to share it.

I'm a mom of 2 little girls, a Virtual Assistant and founder of The Brightest Side. I started this work to earn money working online at home as a Freelance Professional while being available for my family. What started as a side hustle has now evolved into a full time Virtual Assisting business and now I teach other people to do this work with digital products such as this **Guide** as well as my **Basic Virtual Assisting Course on Udemy.com**, and several other digital tools available on my websites.

The formula to get set up is the easy part. It's up to you to be self-motivated, organized, ready to do the work, and honor your time and value as a professional. Those are the things you have to bring to the table.

When I started this work I did not have advanced computer skills, I was not an excel spreadsheet wiz, and I am still trying to figure out the world of SEO. But, I'm a dedicated, responsible women who has been a working professional for well over 20 years and I knew I had a lot to offer. The most important thing you need to get started developing a successful career online is the belief that you can do it. If you have a positive mindset and put in the time and effort, you can make this work for you.



Working remotely is nothing new

Many full time jobs offer an option to put in hours off site, but what IS relatively new is the option to work through online marketplace websites such as Upwork.com as a completely independent contractor.

Upwork.com is a global freelancing platform where businesses and independent professionals connect and collaborate remotely. This platform allows for a freelancer to take a talent or specialization in spreadsheets, accounting, editing, writing, proofreading, or virtually anything, and work directly for a business owner without being an employee. This both eliminates the often difficult hurdle of finding clients as well as protects independent contractors by keeping all time tracking and payment on the marketplace website.

Freelancers on Upwork.com are hired to work on specific projects and work on a contract basis. Business owners pay only for productivity avoiding all of the expenses traditionally connected to having an employee. Many work part-time, some by projects and some earn a full time salary, but there is a wide spectrum on there and some people, such as moms, have the freedom to work the hours that fit into their life to earn the income they need. There are no minimum of hours required to be worked and no restrictions on how much work they can accept. They do keep a rating system, so it's the responsibility of each party to maintain a high degree of integrity which is reflected in their scores.

With the introduction of Upwork.com as a publicly traded company in 2018, we are provided solid proof of concept that working virtually is taking hold and taking off. It presents a whole new way to work from home without being tied to a traditional job, but still be able to connect with people looking for support.

Google reports that over \$1.56 billion in revenue changed hands on the Upwork platform between 2017-2018.

And, Upwork is not alone. They may be one of the more well known services of it's kind, but there are other sites that offer similar services such as peopleperhour.com, fivrr.com, fancyhands.com and so many more making it possible to earn a full time salary through a matchmaking platform and working online. None of these sites have an exclusivity clause, so it's possible to hunt and gather from any and all of these sites at the same time. The possibilities are truly incredible if you have the ambition.

Virtual Assisting may provide the solution you've been searching for, but if you're still not convinced here are a few more examples...

Virtual Assisting Agency and website virtalent.com estimated that at the end of 2018, the VA Industry was valued at over \$5 billion.

Another marketplace for connecting business owners with freelancers, flexjobs.com, conducts annual surveys of professionals and their attitudes toward flexible work and their results were impressive to say the least.

In a survey of 5,000 professionals, the number of people who say they have quit a job due to lack of flexibility nearly doubled from 17% in 2014 to 32% in 2017. They have also found that remote work has grown faster than any other commute mode in more than half the top US metro areas over the last 10 years beating out cars, buses and the subway.

Flexjobs also made a staggering long term prediction about the future of remote work and "The Gig Economy" (task based work). They predict that 58% of the US workforce will be freelancing by 2027. That's a full blown culture shift that will have a ripple effect on several other businesses that support people in their working role.

The opportunity to work online can be a game changer for an inconceivable amount of people and have far reaching impact on how we conduct business.

Because the internet has given me the opportunity to be free of a traditional job, I can redefine what working means to me and my family and it can do the same for you.

If all of that was not enough to convince you, let's have a look at how expensive working a traditional on location job can actually be...



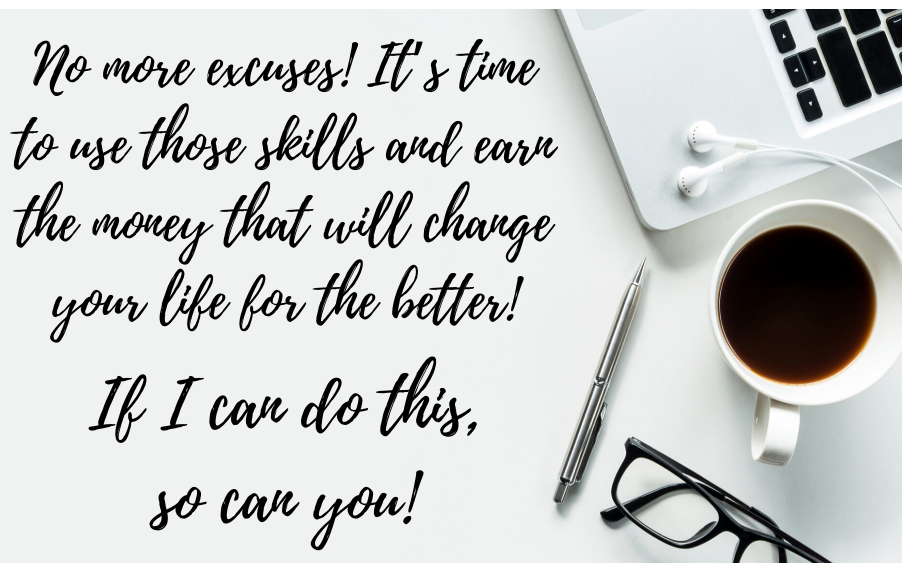
Careerbuilder says that:

"going to work everyday is not a cheap endeavor"
in an article on businessnewsdaily.com

- **Driving:** The research found that 47 percent of those who drive to work spend between \$10 and \$25 on gas each week, with 30 percent spending between \$25 and \$50.
- **Public transportation:** Nearly half of those who take a bus or train to work spend more than \$25 each week to do so.
- **Lunch:** While more than 70 percent of workers pack a lunch each day, half of those who don't spend an average of \$25 a week to eat out.
- **Coffee:** Half of the employees surveyed buy coffee during the workweek. Of those, 71 percent spend less than \$10 a week, with 25 percent spending between \$10 and \$25.
- **Day care:** Nearly 30 percent of working parents with kids under age 18 living at home spend money on child care. Of those, more than one-third spend \$500 or more on day care each month.
- **Pet care:** Nearly 60 percent of the workers surveyed have pets. More than half of those spend less than \$10 per week on pet care, with 33 percent spending between \$10 and \$25.
- **Apparel:** Nearly half of employees surveyed spend less than \$250 a year on clothing, shoes and accessories for work, with 35 percent spending between \$250 and \$749. Just 5 percent spend between \$1,000 and \$2,000, and only 2 percent spend more than \$2,000 annually on work attire.

A few things I've learned...

- 1 Many business owners need more help with their basic everyday tasks, not just the complicated technology involved in running their businesses.
- 2 Most work experience, as well as life experience, lends itself well to becoming a Virtual Assistant if you have the motivation to get started and find your niche.
- 3 There are so many free classes and services on the internet that you can learn everything you need to fill your gaps in knowledge without ever paying a dime.
- 4 There are so many people with computer skills and/or work experience that don't realize how much they have to offer, even if they only have minimal skills.
- 5 Attitude, work ethic and professionalism can go a lot further than an advanced degree or years of training.



*I'm not
just making
money
working
from home,
I'm also
saving it!*





*Let's
Get
Started*



Why Virtual Assisting?

Are you looking for a work at home option that does not involve a complicated start up process with fees and commitments?

Do you have prior work experience that has left you with basic computer skills?

Are you a motivated and organized person who can stay on task and get things done?

Are you looking for better work/life balance?

Do you want to have more control over your schedule and the work you do?

Do you want the freedom to work from home or anywhere you choose?

What if I told you...

As a Virtual Assistant you can have



No boss
No set schedule
No commute to work
No dress code
No restrictions

Instead, you can

- ✓ Have better work/life balance
 - ✓ Have control of your schedule
 - ✓ Have control over the work you do
 - ✓ Work from anywhere you choose
-



This work is
perfect for you
if....



You want to become a digital nomad and work from anywhere



You are a stay at home mom and want to work from home while still being available for your family



You've been looking for a side hustle that does not involve complicated or expensive start-up costs



You want to be your own boss and make your own schedule



You want to set up a freelance business using the skills you already have



Can I still make money
if I only have basic
computer skills?

yes!

This is what makes Virtual Assisting so great!

Every business has basic needs like inbox management and proofreading. You can grow an entire business on those skills. And, chances are you have other skills and specialties you have not even considered. Not all businesses are the same just as not all Virtual Assistants are the same.

Decide what skills and services you feel comfortable offering to potential clients and start building your VA business around them. Next, we will explore a list of jobs and projects typically handled by Virtual Assistants, but this field is constantly growing and the possibilities are endless!

What does a Virtual Assistant do?

A Virtual Assistant works remotely or "virtually" with established online (and/or brick and mortar) businesses as a freelance consultant to handle details and put plans into action. A Virtual Assistant builds their own business by helping others build their businesses. A VA remains their own boss, but works with a business owner to complete various tasks eliminating the need for the hiring process or paying benefits, health insurance and FICA.

As a VA, I've had clients who live anywhere from down the street to New Zealand and everywhere in between and the work is basically the same. I complete agreed upon projects remotely while staying in touch over the phone, text, email or video chat. Hiring a VA helps keep business on track and life in balance by outsourcing the tasks that can easily be handled by someone else. As a business grows, it's important to find the right support.

A Virtual Assistant can help with anything from the most complicated coding to basic inbox management and so many things in between depending on their experience and skill level. The right VA can be integral to your day to day business operations. A VA can also assist with life's other responsibilities such as finding the perfect gift, sending flowers, catering a meeting, coordinating events, or arranging travel plans.

Sharing the burden of everyday tasks will lighten the load of a business owner and help keep focus where it is needed most, on growing their business.

So, you want to be a Virtual Assistant?



What tasks will you do for your clients?

You can turn any skill set into a business, it just takes creativity and motivation. You already have several skills that would benefit business owners and lead to money making projects online. Following is a comprehensive list of tasks that small and micro business owners are outsourcing to Virtual Assistants grouped into 4 categories



Basic Administrative Tasks



Marketing Tasks



Social Media Management



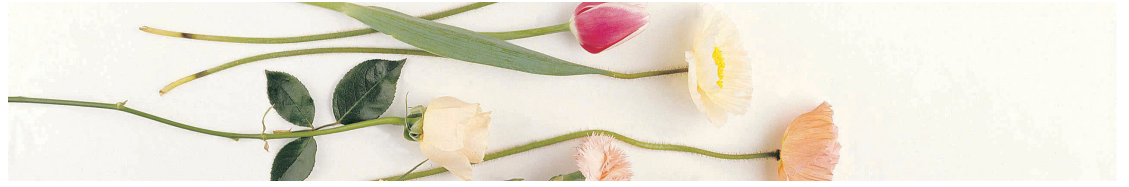
Website Design and Management















Basic Administrative Tasks



- 🌸 Inbox and Voicemail Management
- 🌸 Schedule Management
- 🌸 Proofreading
- 🌸 Presentation Preparation
- 🌸 Personal Shopping
- 🌸 Travel Planning
- 🌸 Dinner/Hotel Reservations
- 🌸 Customer Service
- 🌸 Online Shop Management
- 🌸 Transcription
- 🌸 Data Entry
- 🌸 Research
- 🌸 Event Management
- 🌸 Power Point Creation

Marketing Tasks



-  Content Creation
-  Content Calendar
-  E-book creation
-  Webinar Creation
-  Product Launch Assistance
-  Video Editing
-  Photo Editing
-  Branding
-  Graphic Design
-  Project Management
-  Event Management
-  Research
-  Competitor Analysis
-  Marketing Audit

Social Media Marketing



- 🌸 Content Creation Management
- 🌸 Social Media Scheduling
- 🌸 Pinterest Pin Creation
- 🌸 Pinterest Account Management
- 🌸 Product Launch Marketing
- 🌸 Facebook Group Moderation
- 🌸 Social Media Moderator
- 🌸 YouTube Management
- 🌸 Graphic Creation
- 🌸 Project Management
- 🌸 Newsletter Creation
- 🌸 Create Opt-ins and Freebies
- 🌸 Competitor Analysis
- 🌸 Marketing Audit

Website Management



- 🌸 Content Creation
- 🌸 Website Design
- 🌸 Website Maintenance
- 🌸 Blog Management
- 🌸 Analytics Reporting
- 🌸 SEO
- 🌸 Online Store Management
- 🌸 Content Backup
- 🌸 Graphic Creation
- 🌸 Project Management
- 🌸 Special Features Management
- 🌸 Competitor Analysis
- 🌸 Website Audit/Functionality Tester
- 🌸 Design and Content Updates

Work YOU Can Provide



Make a comprehensive list of tasks YOU can do and services you can provide for clients

Think computer skills, hobbies, interests, everything! What do you have experience doing? What do you enjoy doing? What comes easy for you? Brainstorm all of it!

Example list of ideas...

Gmail Inbox Management

Calendar organization

Travel plans

Personal Shopping

Canva Graphics

Topic Research

Photography

Yoga

Hiking

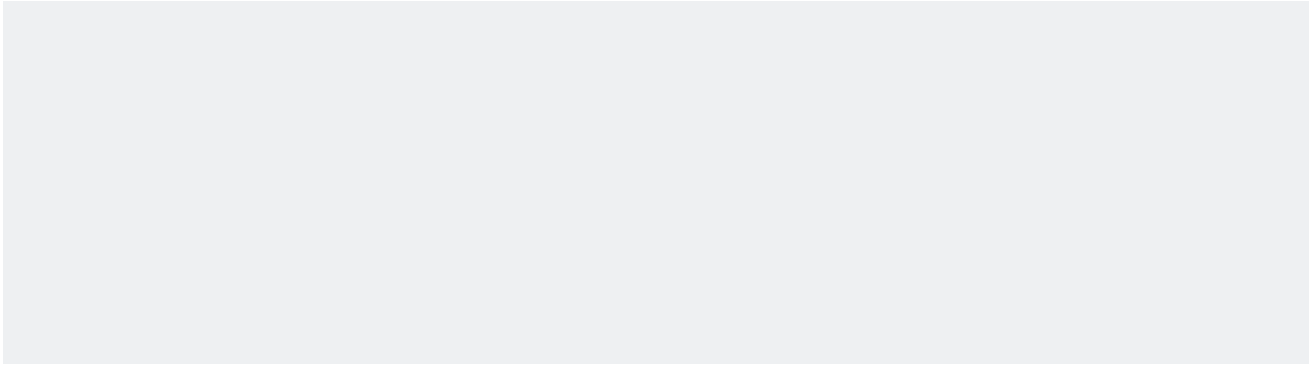
Spanish

Books/reading

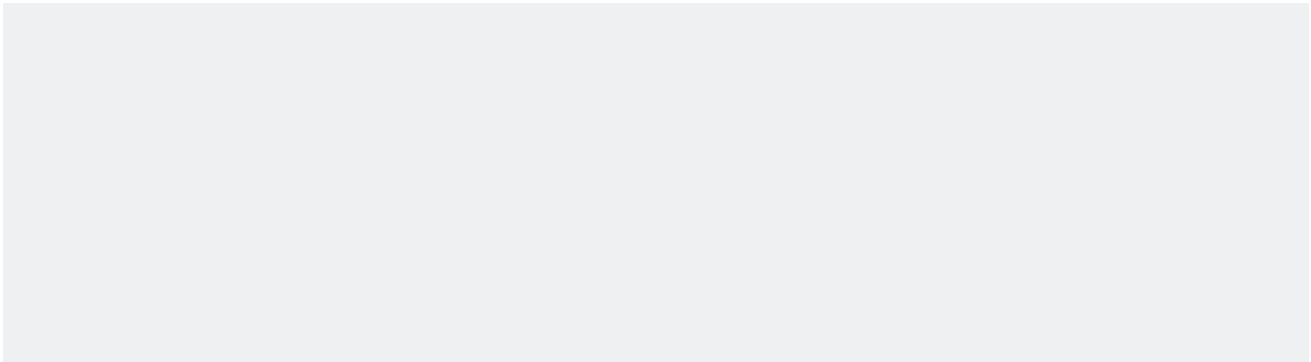
Traveling

Now make YOUR list...

What are your top 3-5 tasks you can do for clients?



What are 3-5 hobbies or special interests you know a lot about?



Here is just one example of how to put it all together...

I enjoy traveling and making travel arrangements, so I know I would be a good VA for either a business owner who travels often or a travel agent who arranges travel for customers.

Design Your Schedule



Consider how much time you will devote to your business both for clients and for yourself. Will you work full time, part time or project based for extra income?

Don't forget....

When you build your work schedule, set aside time for working on, building, and maintaining your own business, not just hours devoted to clients. You will need time for doing tasks such as creating your on boarding process, marketing and social media efforts, and maintaining your own website if you choose to, so make sure you have enough time to do all of that as well have enough hours to devote to client projects.





What does your ideal work week look like?

M

T

W

Th

F

Your Virtual Assistant Identity

Now that you have thought about what you want to offer and what you want your work schedule to look like, a great way to begin establishing your identity is with a mission statement

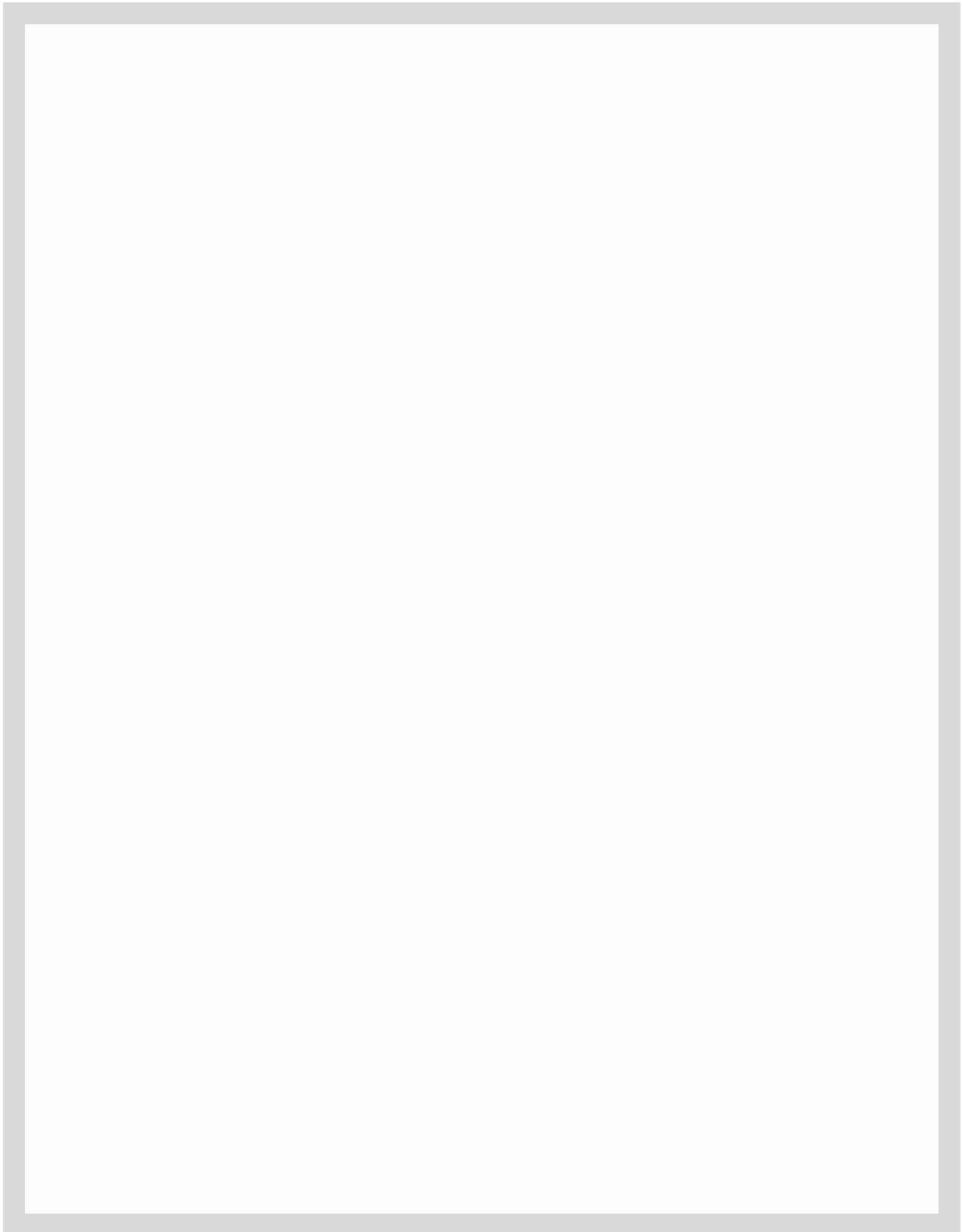
A mission statement is a specific and concise statement that conveys what you will offer your clients and your strategy to do so.

For example,

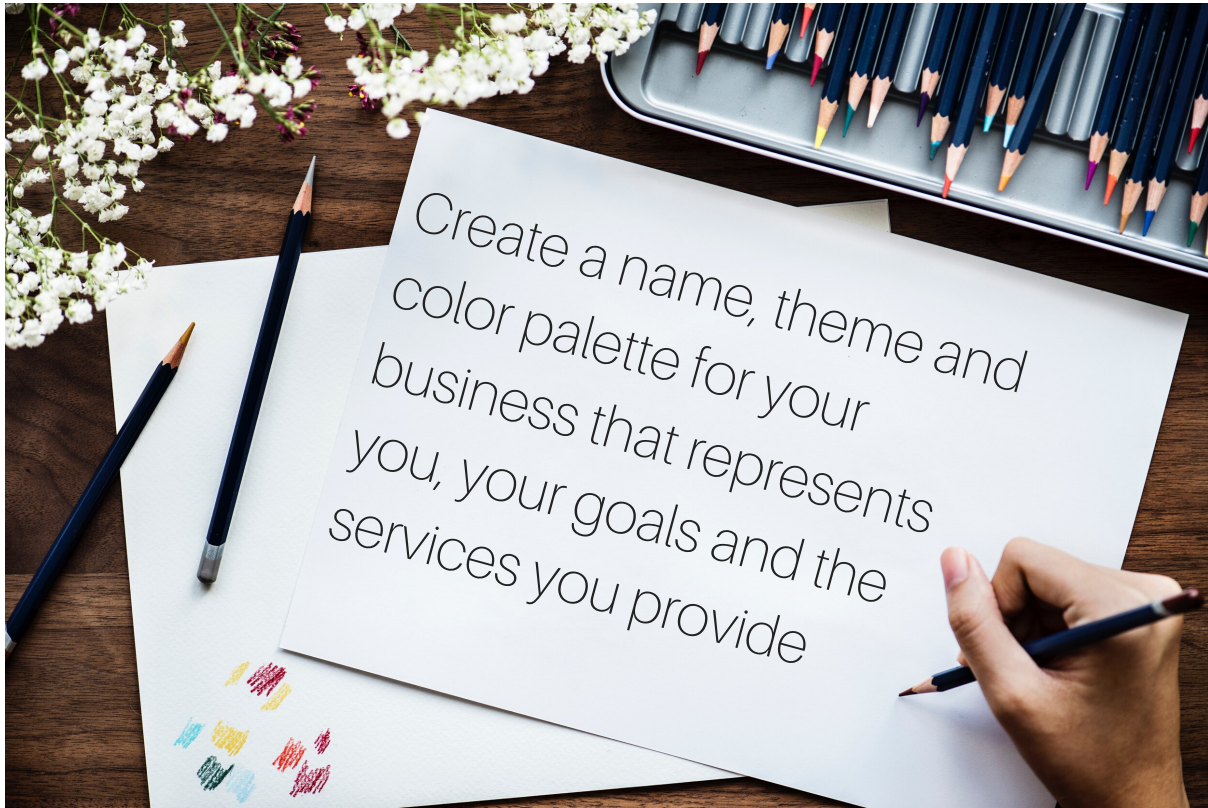
The Starbucks Mission Statement is:
"Our mission: to inspire and nurture the human spirit – one person, one cup and one neighborhood at a time."



What is YOUR mission statement?

A large, empty rectangular box with a thick gray border, occupying most of the page below the title. It is intended for the user to write their mission statement.

Name Your Business



Make sure you chose a unique name for your business that is not already being used and that clearly represents you and your business goals. Check to be sure the domain name you chose is not already taken and do a Google search to see what you find. When you create the tone, color palette and identity of your business, it helps to find and create graphics that will help make your business stand out on social media. I like to use non-copyrighted photos, as well as my own, to make graphics such as the ones included in this Guide. Here are a few websites to explore...

unsplash.com
morguefile.com
pixabay.com
freedigitalphotos.net
dreamstime.com

negativespace.co
pexels.com
freerangestock.com
bigfoto.com
kaboompics.com

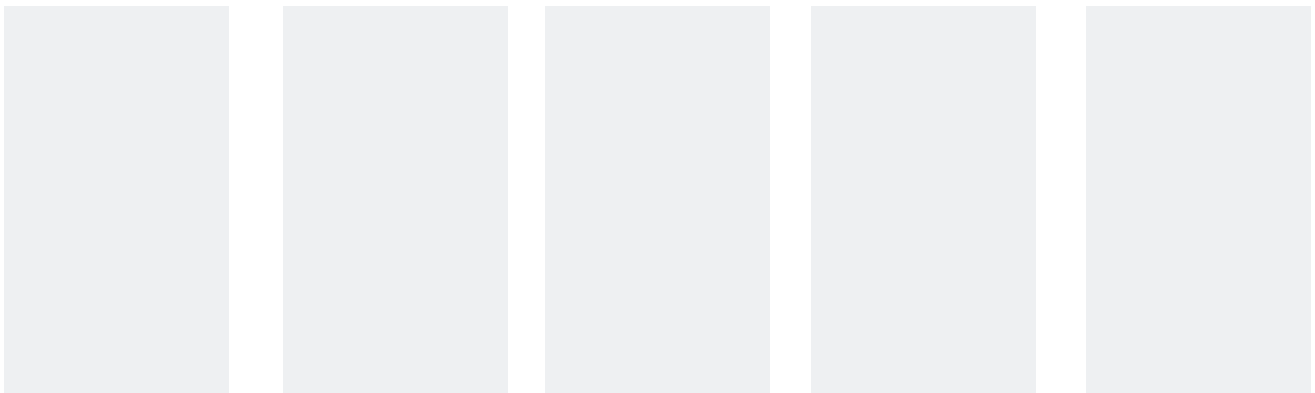
My VA Business will be called:

My color scheme is:

(Visit <https://colors.co/> to easily create a color scheme)

A HEX code is a 6-digit code comprised of numbers and letters so you can use the exact colors across several platforms.

My HEX codes for my 3-5 brand colors are:

Five empty rectangular boxes arranged horizontally, intended for the user to enter their brand color HEX codes.

(It's ok if you don't know what a HEX code is or if you don't want to create a color scheme for your business. This is not required)

Creating a logo or signature mark

We can all recognize the logos of certain large companies because they have been strategically used in major marketing efforts. Can you name these 3 popular logos, or pictorial marks...



An easier option for creating logos is to use a Wordmark:



You can create a wordmark logo very easily using canva.com and find tons of free and paid fonts online at sites such as:

<https://fonts.google.com/>

<https://www.1001freefonts.com/>

<https://www.pixelo.net/>

and so many more!

Here is an example of a wordmark for a VA business:



(Creating a logo or watermark is optional, none of this is required to get started working as a VA,)

Your Elevator Speech



An elevator speech is a concise description, or snapshot, of who you are and what you do in the time it takes to ride briefly in an elevator.

...or when you chat with someone briefly in a coffee shop and they ask about your business.

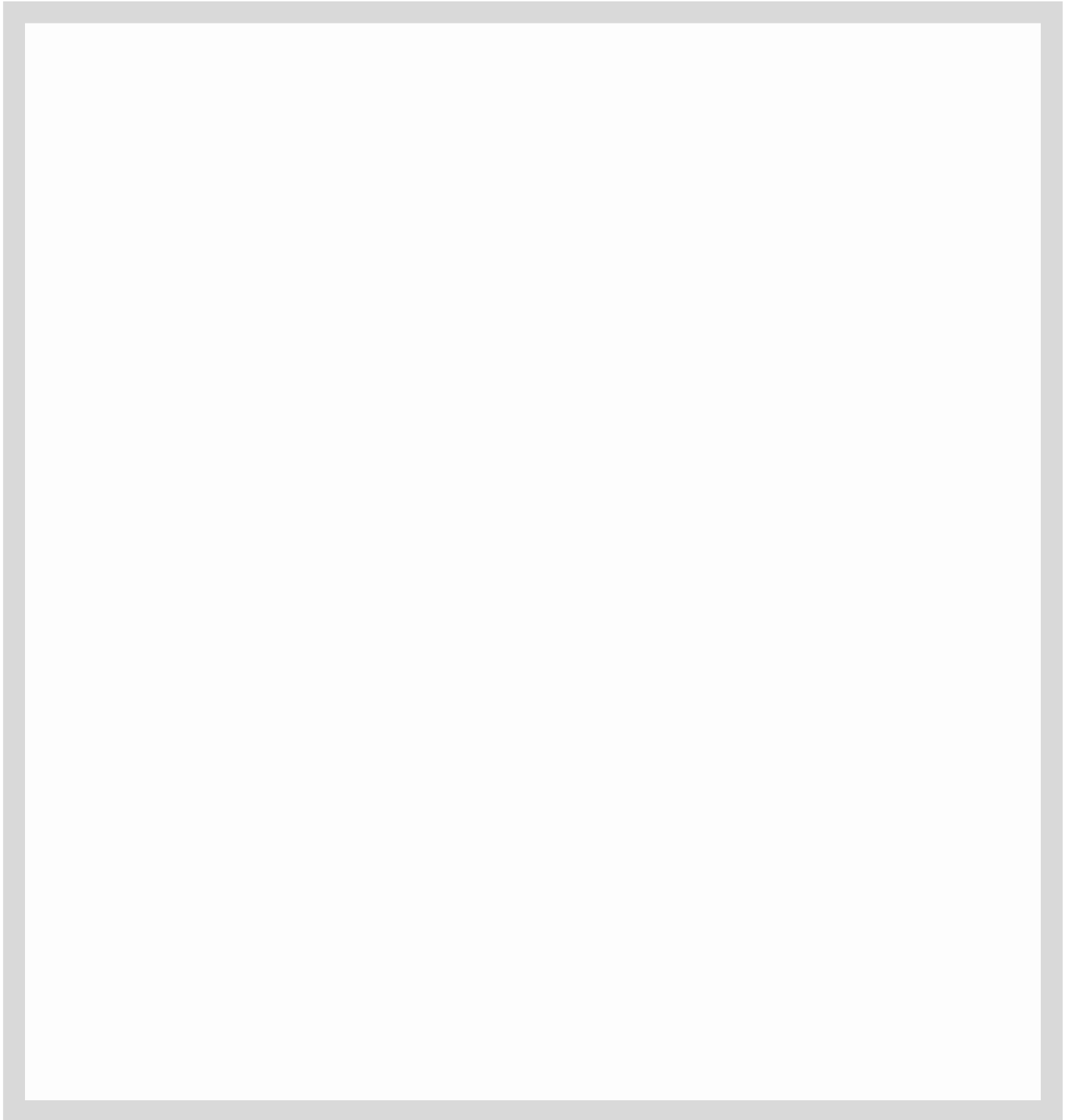
...or when you are in line at the bank with someone who starts a polite chat.

...or when you are waiting in line at the grocery store and strike up a conversation.

...or you are at a gathering and have the opportunity to meet a potential client.

These are organic networking opportunities and the more you prepare for them, the better you will connect!

Plan out your elevator speech so you will always be ready for an opportunity to share your business with others:

A large, empty rectangular box with a thick gray border, occupying the lower two-thirds of the page. This box is intended for the user to write their elevator speech.

Business Tools



Before you begin looking for potential clients, decide which business tools make the most sense for your needs.

Here are some example of some possible tasks and some tools that will help you complete them.

Tasks

Email provider
Scheduling
Payment Processing
Social Media
Project Management
Graphic Design
Video Conferencing
File Management
Time Tracking
Photo Images

Tools

Gmail
Google Calendar
PayPal, Venmo
Facebook, Instagram
Trello, Asana
Canva, Illustrator
Zoom, Skype
Google Office Suite
Spreadsheet, Harvest
Unsplash

Planning YOUR business tools

Tasks

Tools





*Let's
Talk
About
Clients*



Who is Your Ideal Client?

*If your ideal client is anyone,
then you are targeting no one*

Decide on a specific niche and target your marketing very carefully to those who would need your service and you will be more likely to find clients. For example, if you enjoy photography and know a bit about it, you may be the perfect VA for a photographer. Or, if you are very skilled at making spreadsheets or power point presentations, you may want to highlight that skill to attract a business owner who needs a VA who has those specific skills.

This is how we can begin to define your target market.

Go back to the list of services you can provide, consider your business identity, your mission statement and the tools available to you. Now decide who will be your ideal client using all of that information. Next you can consider where you will find good leads that will convert into paying clients.



Defining your target market:

1. Are business owners looking for the type of skills and projects you are offering? Check competitors and take the temperature of the current market. This will take a bit of research and depends on the type of work you are offering.
 2. What is the age and social media presence of your target audience. I have found most of my clients on Facebook and Upwork. Consider whether or not your ideal client is likely to be on those platforms.
 3. Are there enough people who need my service? This will take a bit of digging, but if you know your niche, you should be able to know how and where to find this valuable information.
 4. Can those people who need my service afford to outsource? You may want to do a bit of market research and ask some business owners what they think of hiring a VA. You may also be able to ask what they would pay for your services.
 5. Is my ideal client actively seeking my services online? Virtual Assisting is gaining popularity and becoming a very convenient way for small business owners to find the help they need in a way that works for them, but is your ideal client searching for this help? And if they are, where are they looking?
-



Connecting with Clients

Many businesses need a little extra help, but don't want to hire more staff. That's when they come looking for you.

But, where are they looking?

Next, I will provide a list of different ways a small business owner may find potential candidates, but please be sure to do your own due diligence with each method as well as each potential employer. Some of these have worked well for me and some have come highly recommended by other VAs. This is only a suggested list to get you started and I do not promote any individual method more than another. They are simply meant to be a starting point for you to research. Please visit each website suggested for more specific information and guidelines.

Consider beginning your search locally with Meetup groups, Expos, Co-working spaces, and apps such as Nextdoor. And, remember to check with family, friends, colleagues, your local Chamber of Commerce and local Community Organizations.

Online Resources

Upwork.com

At Upwork.com you will find a range of talent that spans the spectrum of online specialities. You create a profile and then search potential jobs and submit a proposal. They authenticate email addresses for you as well as display job success scores and feedback from previous projects. You can evaluate potential connections and set up interviews. They have messaging and video chat features that allow you to keep all communication on their site. They also handle payment through their site as well as provide a time tracking tool that takes intermittent screen shots of the work being done. I like the way Upwork provides you with all the tools you need from start to finish right on their site.

Facebook.com

Facebook has countless groups where you can connect with both small business owners and other VAs. Each group sets their own parameters and rules about posting and making connections, but chances are if you find the right group (or groups) you will find engaging on Facebook to be very productive. You can contact the admin for each individual group if you have specific questions about that group. However, just know that there is no screening process in these groups, so you are on your own with that. You can use Facebook Messenger and Video Chat to communicate with potential candidates, but you will have to find an outside site to handle third party payment such as PayPal or Square.

Indeed.com

Indeed.com is a worldwide marketplace of job postings where people can connect using an employment-related search engine. Indeed offers a pay per click sponsored job posting model, but it is free to search and apply for work. There are no signup fees, no subscriptions, and no contracts required to use Indeed, and you can sign up for a free account and keep track of the jobs you want to save and the jobs you have applied for in your account.

Flexjobs.com

Flexjobs.com offers free, searchable job postings and a well-written blog with unlimited resources and information for both employers and job seekers. FlexJobs is a subscription service for job seekers. They find, screen, and post legitimate, professional-level flexible jobs to their site so freelancers feel confident looking for work and are willing to pay for their service.

Ziprecruiter.com

Search a database of available jobs with keywords and location. Apply with One Click and say goodbye to long applications. Upload your resume and apply to jobs in a click or a tap. When you apply to a ZipRecruiter job, they keep you updated every step of the way with notifications about how many times your application has been viewed and when you have new messages from the hiring manager. Some trending job searches are "online work at home" and "no experience".

It's A Match



When you find a client, the first thing to do is have a Discovery Call

Get to know your client before you begin working together to make sure it's a solid match. Here are some sample questions to consider asking during your first call with a potential client.

- 1 Tell me about your business.
- 2 What are your future goals for your business?
- 3 How can a Virtual Assistant help your business? What is a sample task that I would be doing?
- 4 How would you like to communicate and how often?
Telephone, email, video conferencing?

Follow the Client Discovery Call Script to help you navigate your calls with clients.



Client Discovery Call

Date of call:

Name of Client:

Client Company:

Social Media Info:

Services needed:

Hours needed:

Client Discovery Call

The Plan:

Top 3 Tasks:

Long Term Goal:

Touch Base Strategy:

Time Tracking Tool:

Client Discovery Call

Billing Method:

Onboarding Notes:

Hours/ Availability

Additional Expectations:

Client Discovery Call

Next Steps:

After Call Notes:

Test Task



Just starting out as a VA and have no portfolio, resume or testimonials? That's ok!

Suggest a test task .

One way to show your willingness to prove your skills is to request a test task. A test task gives both you and your potential client a chance to have a sample interaction and experience what it would be like to work together. Any VA can say they know how to complete a task, but seeing the result of a test task will speak volumes about the work you are capable of doing as well as give you a chance to display more of your personality, professionalism and work ethic.

Actions speak louder than words!



Let's take a look at
what you've
accomplished so far...

You've considered the services you can provide for clients

You've designed your ideal schedule that works for your lifestyle

You've established your Mission Statement

You've named and branded your business

You've developed your elevator speech

You've decided which business tools work best for you

You've identified your target market and ideal client

You've considered which online resources will be the best places
for you to find clients

You've thought about what a discovery call will include with
potential clients

You've considered a way to prove your skills to a client who asks
for recommendations or a portfolio



*a
few
more
things
to
consider*

Sustaining Success



Sometimes the most basic skills make the biggest impact

Clients and business owners are not always searching for the most tech savvy candidates to help them run their businesses. Very often, a competent, patient and mature professional who is able to conduct themselves with kindness and grace is the one who will stand out in a crowd no matter what their skill set.

There are more and more business owners reaching a point in their business where they need an extra set of hands to take over basic everyday tasks in order to free up the time to let them focus on growing their business. Having that help can be what allows a business to succeed.

Know who you are as a Virtual Assistant and be honest and straightforward about what you are capable of accomplishing. Sometimes just the task of managing an inbox or proofreading content can make all the difference for a busy professional trying to grow a small business.

Stay true to who you are, know that you have infinite value and find the clients that see you as an asset and you will find sustainable success as a Virtual Assistant.



Creating a Productive Home Office

Make sure you have a productive home office where you can work. It's amazing how much more I can get done when my office is organized and inviting as opposed to messy and stress inducing. Your space does not need to be fancy or even very big, it just needs to be a place where you feel comfortable so you can be creative and get things done. I find it's easier to take my work to other locations like a coffee shop or shared work space when my home base is well organized and I'm being mindful of treating it all like a professional business.

Let's focus on creating a dedicated office space that fits your unique needs and work personality. Following are 5 tips to consider when you set up your home office **and** 5 important things to remember when you work from home.

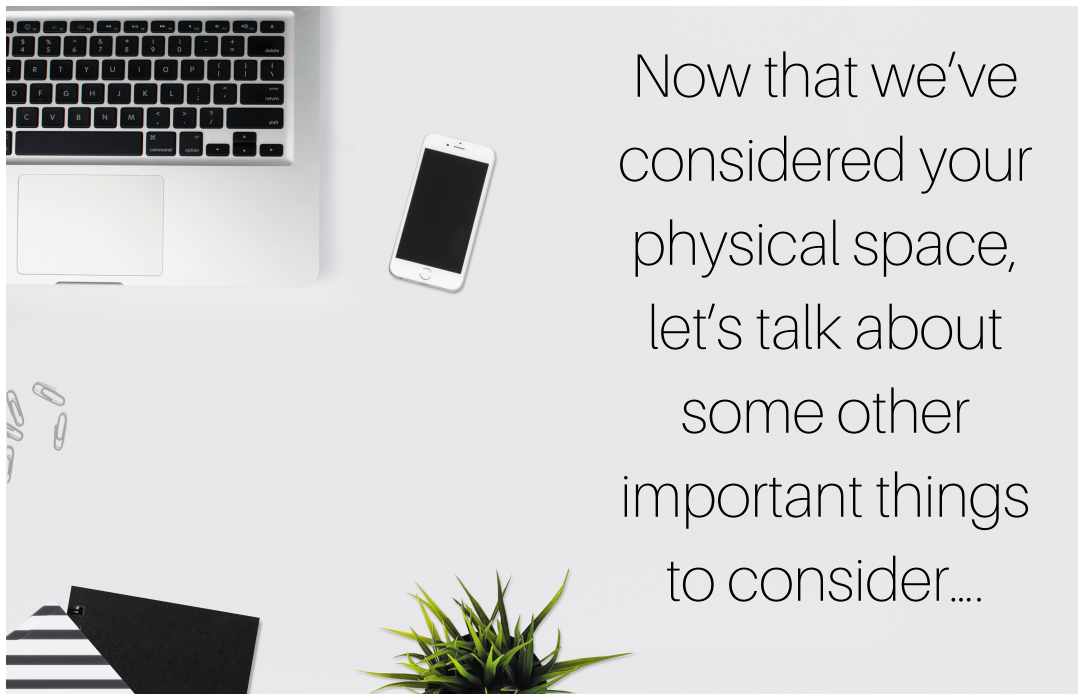
1. **Do you have the privacy you need?** If others will be home while you work, you may need to ensure that you have a private space. If that is not an issue, then you have more options for the location of your work space.

2. **Do you have any distractions in your home office?** Make sure you don't have anything around that will draw your attention away from the task at hand. But, it's nice to have a few inspirational objects that make you feel calm or spark creativity. I like to include a few spiritual objects and artwork that I love because that is something that inspires me.

3. **Consider what organizational tools you will need to stay on top of things.** Are you surrounded by clutter? Consider what items are in need of organizing and go from there. Do you need a more functional filing system? Do you need a way to keep your office supplies in check? Be specific about your pain points of staying organized and look for real solutions. Make time to keep your systems in place ongoing, but be realistic with yourself when considering your work personality.

4. Do you have the right equipment? Is your computer up to the task of handling your business needs? Is your printer trustworthy? Do you have an ergonomically functional chair so you can sustain long hours at your desk?

5. Is your calendar and appointment booking system working for you? Do you have a way to keep track of what needs to get done as well as when it requires your attention. Some prefer a digital calendar and some prefer the old fashioned written planner. Whatever works for you is the right choice.



Now that we've considered your physical space, let's talk about some other important things to consider....

1. Be sure to set times for breaks. It's easy to get on a role and keep going, but everyone benefits from taking a brain break. Schedule them if you need to. If you tend to work long stretches without a break, try setting a timer.

2. Keep a regular eating schedule. When I work from home it's tempting to snack all day and never stop for a meal, or forget to leave time to eat!

3. Move your body. I've been known to walk in circles around my house when the weather is bad. I have to move my body everyday or it's harder to sit in one place for long periods of time to get work done. Make sure you are leaving time to workout, go for a walk, or just get out of your chair and stretch.

4. Drink water! Don't forget to stay hydrated!

5. Know when to call it a day. Because I work from home, it is often tempting to work throughout the day and night, even when it gets in the way of family time. It's important to close the computer, be present for my family and resist the urge to keep going on projects that I'm excited about. There will be time tomorrow to get more work done.

Translate Your Existing Life Skills Into Your Business Personality

Take a moment to consider the parts of your personality that can be assets to a work at home, self-driven business. You may already possess many of the important and sought after skills that business owners are looking for right now. Think about the words you put on your resume and how you can expand them into a longer description of who you are as a professional.

Here are a few examples to get you started:

The Self Starter - A self-motivated person is already way ahead of a procrastinator, or less driven person no matter what the skill set. In a field like Virtual Assisting, the fire to achieve can go further than having more advanced skills. If you can work at home and stay focused, then you can translate that to clients and help them stay on task.

It's difficult to teach a person to be self-motivated, so if that is already a big part of your professional persona, then you are ahead of the game. Be sure to highlight that as an asset.

The Organized Desk - If you have a perfectly organized desk and everything is in its place, then you have a leg up already. Some small and micro businesses are in dire need of getting organized and staying that way, so being able to find someone who can help them get there is extremely valuable. Imagine yourself coming in and cleaning someone's desk, but virtually. You'd have to get to know them first, figure out what can be thrown away, what needs to be readily available and what can be put in well organized drawers.

For some clients and business owners, there is so much to do for their business, there is no time left to do the more basic tasks such as stay organized. If you are skilled at spreadsheets or know a good organizational online tool such as Trello, you can be of great value to a business owner struggling to get organized and stay that way.

If being organized is already a skill that you have mastered, let your potential clients know.

The Networker - If you enjoy getting and staying connected to your network on social media and you like and comment often to stay in touch with friends, family and folks you meet in niche and specialty groups, then your enthusiasm can translate directly to your clients.

Everyone needs an audience if you want to run a business or sell a product, so if you can offer ways to expand their audience, then no matter what products or services are being sold you can have major value to a business owner. Both online and in-person, good networking can be a major asset, so if you are doing the online work and creating and suggesting opportunities for business owners to have in-person networking groups or meet-up groups in their area, you are building momentum and creating connections even from far away. There will be business owners who don't know how to approach networking, so if you can give them ways to connect then you are adding value to their business.

The Student - If you are a life long learner and enjoy taking online or in-person courses, then you have the personality to help others learn or get motivated to learn. If a business owner needs to know more about a topic, you can be the one to research, take courses and become educated in a certain topic and then translate that to the business owner in less time and in a way that they need.

If you can dive deeper into a platform, program or topic relevant to a business owner, you can help a business owner expand their potential in new areas and as a bonus, you are learning and retaining that knowledge and building your own personal VA tool box. If you learn a new social media portal, new ways to use spreadsheets, more about a branding organizational tool, or new software relevant to business owners, then you can use that knowledge to help them elevate their business as well as offer those skills to your future clients.

The Lifetime Learner is a major asset to any team.

3 Basic Task Examples of a Working Virtual Assistant

A question I often hear is... 'Can I still make money online as a Virtual Assistant if I only have basic computer skills'? And it's usually followed by... 'I think I would be a good Virtual Assistant, but I'm not very tech savvy.'

So, what EXACTLY are Virtual Assistants doing for business owners?

Well, the answer to that varies, but there are some great examples I can give from my own experiences. I consider myself a Basic VA. That means that I'm not an expert at Click Funnels, SEO, Chimp Monkey or some of the other services that are trending and in demand right now. If you are good at that stuff, lucky you, finding clients will be even easier for you. But, all businesses have many of the basic tasks in common and owners need help tackling their long do list in order to free up time to focus on the other parts of their work.

So, what are these basic tasks? Here are 3 real life examples from my life as a Virtual Assistant that I believe only need basic computer skills, solid organization skills, and the ambition to get the job done.

Moving Coordinator - I had a client who was moving in with his fiancée and they were both very busy executives. Each had a one bedroom apartment and were moving in together to a two bedroom apartment in New York. So, they hired me to compile a list of their belongings, the dates that they wanted to move, logistics of their current buildings as well as the one they were moving into (elevators, stairs, etc) and a few other details that needed be communicated to everyone involved. The next step was to contact a few moving companies for quotes and availability. I let them know their choices and they directed me which one to use. Together we finalized details, but I was the one doing all of the calling, organizing and follow up. Then, from 1,000 miles away and all over the phone, I organized it all and made sure it all played out the way the clients wanted. They paid me per hour and it all worked out really well.

I have made several moves personally over the last few years, so my life experience and ability to stay organized and be one step ahead was enough to help them complete their move seamlessly and this busy couple was able to focus on work and not on the details of their move. This experience led me to create my Featured Service - Moving Coordinator which I now offer to clients on a regular basis. I use Trello to stay organized for clients like this, it's the perfect tool.

Proofreader - I'm a writer and I kept a blog about my experience being a new mom for five years before becoming a Virtual Assistant, so using that knowledge, I can now offer myself as a Blog Assistant and content writer. For me, proofreading and blog management is a way that I can help clients who are managing their own blogs without having to know the specifics of the blog itself.

I have a few clients who send me a topic, some basic content and I spend time writing, adding details and proofreading their work so they can post a more polished version to their blog.

Proofreading is also helpful for so many other types of clients. There are many professionals who like to have a second set of eyes on their work before they make it public. So, if you have a good command of the English Language and have basic typing and editing skills, you can turn proofreading into a service that you offer.

If you have graphic design skills, you can add that to this service by offering to create graphics that can be used on the blog itself as well as social media to promote posts, but proofreading can also be a stand alone service.

Data Entry - I had a client send me over 200 business cards and had me create a spreadsheet of all the information on the cards. After entering all of that information into a spreadsheet, this business owner has a new list of hot leads to work on to grow his business. What may seem like a tedious task allowed a business owner the opportunity to reach out more easily to 200 leads that needed follow up.

Another client wanted to switch platforms and realized that the 800 emails she had saved on one of them were not going to be easily migrated to the other. She needed someone to manually retype all of these emails to make her business continue to run smoothly. But, she also has a business to run and had no time to do tasks like that without having to take time away from the actual client work that she depended on to earn her living. So, she hired me to copy and paste each email. It took me about 8 hours in total, but she was happy to pay someone to do it because it meant that 800 client emails were now accessible on her new platform. The investment in hiring a VA to complete tasks like this can mean huge payoffs for business owners.

It is becoming more and more common for small business owners to need an extra set of hands to tackle the more menial work so they can focus their time on the main business at hand.

Legal and Financial Things to Consider

There are a few things that I do not mention in this workbook completely on purpose. Some of these things are necessary and some are not, but these are the legal and financial issues that can arise when doing business. Some of these I have had to deal with and some I have never dealt with, but I always encourage VAs to speak with the professionals of their choice about things such as:

- 
- Taxes and Accounting Services
 - Establishing a Legal Entity
 - Insurance
 - Contracts
 - Banking
 - Deposits and Refunds
 - Invoicing
 - Pro-Bono Work
 - Copyright Issues
 - Privacy Policies
 - Confidentiality Agreements
 - Termination
-



Create a Client Welcome Package

Gather the information
you need to get started
and make a good first
impression



Welcome Letter

A welcome letter introduces you and your business and gives you an opportunity to thank your new client for their business.

Use this opportunity to build trust and give clients a bit of information about how you work. Receiving a welcome letter gives a great first impression and gets you off to a great start!





Policies and Procedures

Establishing policies and procedures can help set boundaries with your client and makes sure that they understand how you work and what to expect from you. Be sure to include your hours of operation. If a client contacts you in the evening, be clear about when they can expect a response.

This section should also include details such as preferred method of contact, billing methods and accepted forms of payment. Each Virtual Assistant has their own specific guidelines, so this is a good chance to let your clients know exactly what to expect from you.

If you know that you will need 24 hours to respond to emails, this would be a great place to outline that. If you decide to give a client your cell phone number and let them know to text you if a task needs more immediate attention, this is the place to set up that expectation.

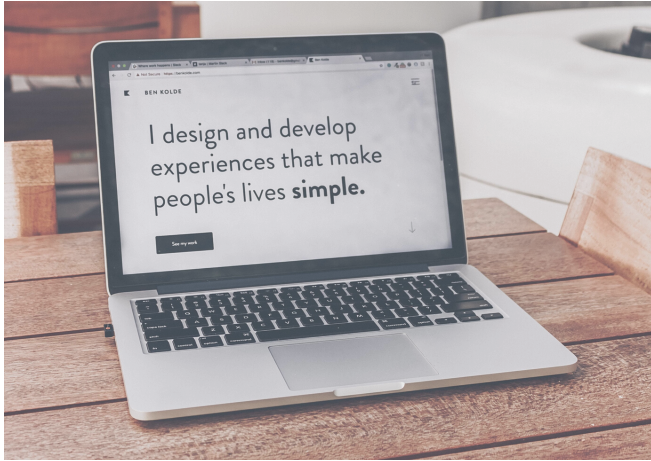


Client Onboarding

Create a process that gathers information from your client. Include ways to gather as much information as you feel you need to work well together. Ask about their business, mission statement, products and services, logos, target audience, ideal client, and anything else you think you will need to better serve your client and their vision.

You can create a digital form for this, or gather this information during a Discovery Call. I have provided you with a sample Discovery Call form, but each Virtual Assistant should customize their onboarding process to match their own needs.

This is a great time to consider your organization process as well. Will you keep a digital file for each client or do you prefer to have a physical file folder for each one? The more organized you are at the start, the better.



List of Services

A list of services explains very clearly what you offer your clients. It can give clients new ideas for how to use you for their business needs. If they hire you for social media, but you are also a skilled project manager or inbox manager, you may find that they need those services as well. You may also find that they can more easily refer you to others if they know more about your complete list of offerings.

This list can be like your resume. Brainstorm all of the services that you feel confident providing for clients and clearly state them. Several sample tasks handled by Virtual Assistants was listed earlier in this Manual. For example...

Writing

Proofreading

Personal Shopper

Calendar Management

Keyword Research

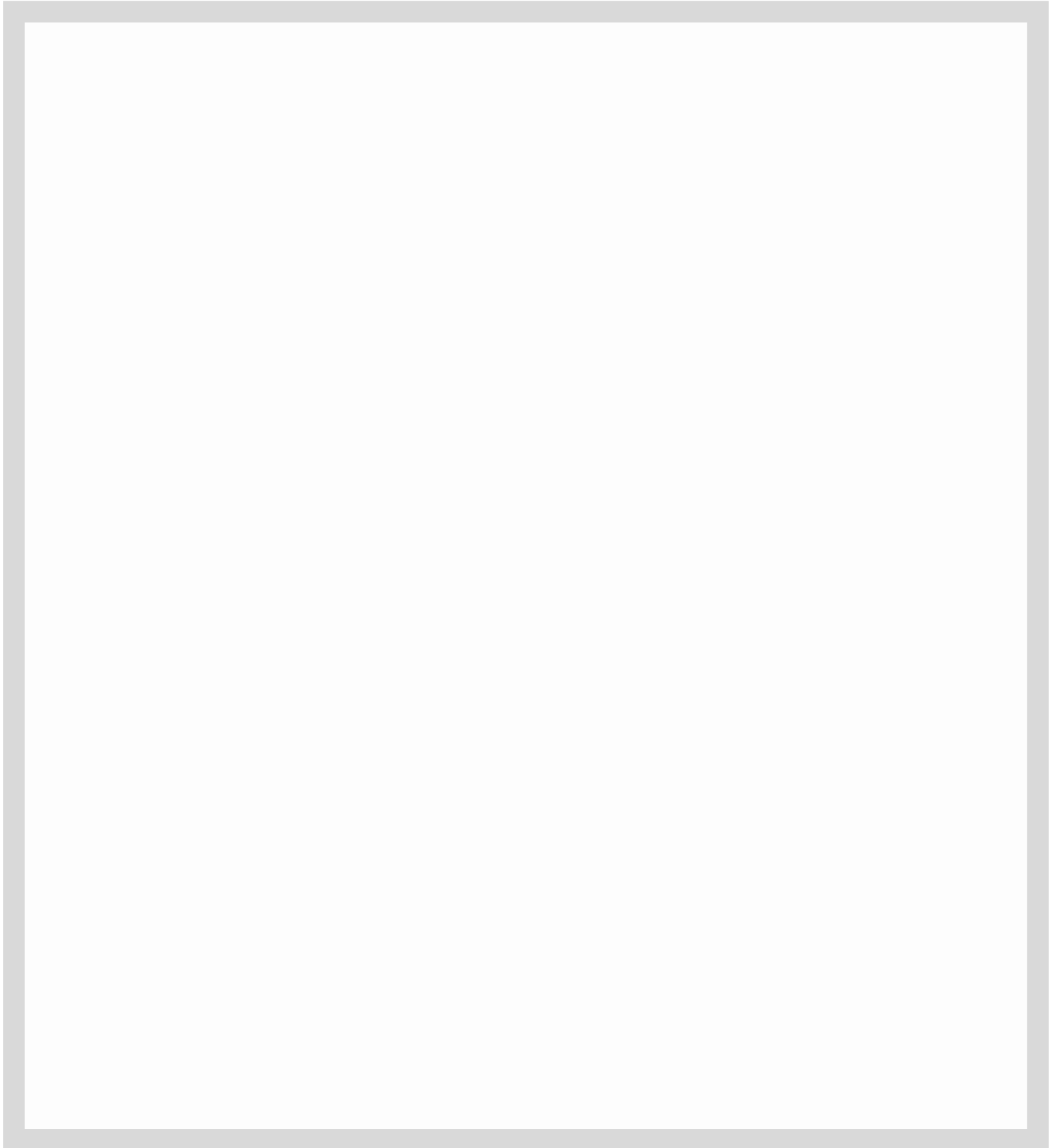
Social Media Management

Customer Service

Excel Spreadsheets

Let's practice thinking about what you will offer to clients.

Write out a service you will provide, the tools you will need to provide it and how long the task will take as if you are explaining it to a potential client interested in your services.





Price Packages

In this section, explain what you charge hourly, as well as what your packages will include. Consider whether you want to put boundaries around your hourly packages. For example, do all 10 hours of a package need to be used within a certain amount of time, or will you choose to be flexible about how fast they use their hours? These are things to consider and outline in this section. The more clearly you state this before you begin working with a client the better.

This is a great place to express your creativity and design skills if you are offering them as a service by creating fun cover photos for your hourly packages as I have below. But, if graphic design is not your thing, don't worry, just state them clearly as part of your onboarding process.



So how much can I earn?



Work 2 hours a day
@ \$25/hr

\$50/day
\$250/week
\$1,000/month

Work 3 hours a day
@ \$25/hr

\$75/day
\$375/week
\$1,500/month

Work 5 hours a day
@ \$25/hr

\$125/day
\$625/week
\$2,500/month

Work 2 hours a day
@ \$30/hr

\$60/day
\$300/week
\$1,200/month

Work 3 hours a day
@ \$30/hr

\$90/day
\$450/week
\$1,800/month

Work 5 hours a day
@ \$30/hr

\$150/day
\$750/week
\$3,000/month

Work 2 hours a day
@ \$35/hr

\$70/day
\$350/week
\$1,400/month

Work 3 hours a day
@ \$35/hr

\$105/day
\$525/week
\$2,100/month

Work 5 hours a day
@ \$35/hr

\$175/day
\$875/week
\$3,500/month

Planning your Price Packages

What will you charge per hour?

\$

Will you offer packages of hours?

How much will you charge for a:

5 hour package

\$

10 hour package

\$

20 hour package

\$

When putting together your pricing, consider giving a bigger discount per hour for purchasing more hours at a time.

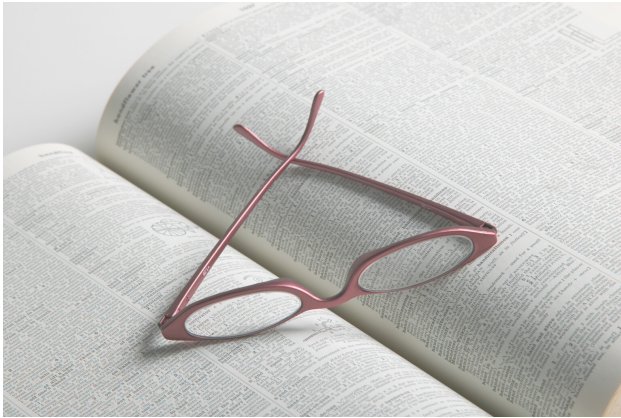


Extra Considerations

Every client is different. Be sure and include a place in your Welcome Package that lets you add unique details or record specific information that may not apply to every client the same way. You can call this section Extra Considerations, Additional Information or Notes, but just be sure and allow for some extra room to keep track of what makes each client unique.



Your Welcome Package is a big part of your first impression. Be sure to proofread everything and remember that all of your communication at the start of your working relationships are a reflection of what clients can expect from you.



Trending Small Business Lingo

Lingo - specific and often trending language used to describe a topic

Running your own small business is nothing like it used to be. With an evolving business comes trending lingo that you'll need to know to stay at the top of your game. It's all about being able to walk the walk and talk the talk... because even the title needed defining.

This section is filled with a mix of old and new business language that is relevant to any entrepreneur. I've also included the names of many popular and trending services, applications and websites that are commonly used in conversation both online and offline when talking about this kind of work. Staying on top of what's trending is often a job in itself!

Actionable - An actionable item is something that you can do.

Bandwidth - The amount of time, energy and resources needed to complete a project.

Best Practices - A constantly changing description of the methods and techniques that deliver superior results in a particular organization.

Blog - An online diary or journal documenting a continuing story or journey normally focused on a specific topic, niche or genre.

Body of work - A way to summarize the total output of your business.

Brand - The name and recognizable attributes of a business. Also considered your business identity, tone and style of communication.

Branding - The name, logo, color palette and all proposed marketing designs for a business.

Business Plan - Outline of your unique business goals, selling points and selection and application of resources. Having a well thought out Business Plan is important for your marketing efforts as well as bringing on investors or to secure any future funding.

Buzz Word - A trending word or phrase in a particular context.

Canva - (www.canva.com) An easy to use graphic design tool used by beginner or less experienced professionals to create graphics for business or personal projects for web and print design and graphics.

Circle Back - Checking back in with someone after some time has gone by usually regarding a specific project.

Content Calendar - A schedule for making content public that lays out where, when and what to publish.

Content Writer - A person who specializes in content creation.

Contextualize - Interpreting circumstances to determine the way it should be described.

Copyright-free Images - An image that is not bound by a copyright and is therefore free to use even without permission.

Co-working space - A public office space where people can pay for time to use the space to work together independently or collaboratively.

Deconstruct - Understanding something by figuring out what it is not.

Deep Dive - An in-depth analysis of a topic.

Digital Nomad - People who use technology for their job but are location independent. A Digital Nomad can perform their work online from any location.

Discovery Call - The initial contact or call with a new client to gather information and make a plan for a job or project.

Disruptor - A “game changer” in an industry. This can be a person, place or thing depending on the type of business.

Ecosystem - The interconnected network of vendors, designers, customers, and anyone related to your business, working together in a way similar to an ecological community in nature.

Elevator Speech - A brief pitch that outlines a business in the time it takes to ride in an elevator, usually under a minute.

Ergonomically Correct - Products designed with efficiency and empathy for the human bodies health and wellness.

Evergreen - Something that has the enduring ability to be fresh and relevant consistently, not just for a short period of time or single season.

Facebook - A free social media platform where members can create profiles, upload photos and share information with other members in their chosen network.

Facebook Messenger - Free mobile messaging app connected to Facebook for its members to send private messages back and forth.

Facetime - A Video Calling software that makes it possible to have face-to-face video communication on iPhones, iPads and Apple computers

Flearning - Failing at a task but learning a valuable lesson as a result.

Forecast - Educated predictions about the sales, profit and cashflow of a business to help the business owner have a handle on finances and other relevant details.

Freelancer - Someone who is self-employed on a task by task basis, not committed to a long term employer or follows a traditional work schedule.

Gig Economy - A market of workers defined by short-term contracts and freelance work as opposed to permanent or traditional long-term work commitments.

Gigger - Someone who performs task based, independent work also known as “gigs” such as freelance or contract-based work. A Gigger may work for several clients at a time to have several streams of income instead of a traditional salary from one employee.

Has legs - A concept or plan that proves to be credible or enduring and can “stand on its own merit”.

Hashtag - A word or several words together preceded by a hashtag used on social media to identify a specific topic.

Inbox Management - The effort of organizing an email inbox to the owner’s specifications including deleting and creating and utilizing folders to separate emails into predetermined and specified topics.

Incentivize - To wave a proverbial carrot under someone’s nose; to entice consumer or stakeholder action in exchange for a specified reward.

Instagram - A free photo-sharing app and social media platform that allows members to create a profile and share photos and videos.

Lean In - Take advantage of opportunities without hesitation.

Leverage - Using something to the advantage of a business.

LinkedIn - (www.linkedin.com) Social networking site connecting members and allowing them to share professional information and accomplishments geared specifically toward the business community.

Logo - A symbol or design made specifically for a business so it can be identified easily.

Low hanging fruit - The tasks and opportunities that are more accessible and easier to tackle, just as the fruit hanging closest to the ground is easier to reach.

Marketing - Promoting products, services and customer engagement. This includes email lists, advertising, social media, brochures and any type of media that spreads the word about your business.

Micro Business - A very small scale business or sole proprietorship with normally only 1-2 employees.

Mission Statement - A specific and concise statement that conveys what a business offers and their strategy to do so.

Mompreneur, seniorpreneur, photopreneur, hairpreneur, etc
- Tack "preneur" on the end of any noun that best describes a startup founder, and the possibilities are endless.

Move the needle - generate a reaction like positive cash flow or a viral social media post that generates online buzz.

Networking - The process of interacting with others to exchange ideas and information about each other and their businesses in an effort to establish professional and social contacts. Networking can be done online and in-person.

Niche - A specialization in business that suits experience and personality.

Onboarding - Collecting information and integrating a new employee or client and the act of becoming familiar with his or her business needs, practices, products and services.

Organization Tool - A project management app or program that allows a business to arrange information and projects in a way that makes sense for that business.

Outsource - Obtain a service or fulfill a business need using an outside source specifically instead of an internal source.

PayPal - An electronic e-commerce third party payment company that processes customers payments online through accounts on its website.

Pinterest - An online search engine style “pinboard” social networking platform that allows members to save images and websites on several boards that you want to refer back to and which are shareable and expandable.

Pitch - Presentation of a business idea to encourage others to become involved in a business in several different ways, typically for investing or additional resources.

Portfolio - A record of accomplishments relating to a specific purpose to show examples of prior efforts.

Price point - Defining the price of something.

Remote Professional - Work performed outside of a traditional office. Many remote professionals work from home, a shared work space or coffee shops and do not have to be in a specific location.

Resume - Record of education, prior work experience and other credentials in either written or digital form.

Scalable - An idea or business venture that starts small and will be able to grow, expand and grow successfully.

SEO - Search Engine Optimization, a strategy for increasing quality and quantity of traffic to your website.

Social Media - Online platforms that allow users to create and share content within their social networks.

Square - Online mobile payment company popular with small and micro businesses.

Start-up - A brand new, often forward thinking business which is typically the result of an entrepreneurial endeavor.

Squarespace - A website building and hosting company that lets customers use pre-made templates to design websites with drag and drop elements that are typically less complicated to use than other tools.

Target Market - A specific group of consumers that a product or service is aimed.

Task based work - Project based or contract work done by a freelancer or independent professional.

Tech Savvy - An individual who is adept at using technology.

Testimonial - A customer review of a product or service.

Test Task - A specific task done by a professional to see if the potential candidate is a good match for the task at hand as well as future related work.

Toggl - A time tracking app that offers online time tracking and reporting services for time based tasks and projects.

Traction - To be gaining "traction" means progress is being made in regards to launching a project, reaching a milestone or cementing a valuable relationship.

Transcription - A written representation of an audio file.

Trello - An online organizational tool that allows users to arrange projects into boards where they can collaboratively add data and communicate details.

Trending - Currently popular with the general public.

Tribe - To "find your tribe" means to discover and gather like-minded collaborators who enjoy commonalities between members.

Twitter - A free social networking online social media platform where members can publish several different types of short posts called tweets to other members.

Unpack - The process of breaking things down into subcategories to better analyze and understand them.

Upwork - (www.upwork.com) Global freelancing marketplace where independent professionals and businesses connect and collaborate remotely.

Video Conference - Audio and video communication between people in real-time.

Virtual Assisting - A virtual assistant is a self-employed, remote professional performing administrative, technical, or creative assistance to clients online.

Wheelhouse - A person's area of expertise about which they may be most comfortable expressing and exchanging information or participating in activities or projects.

Work Personality - An assessment of a person's characteristics that affect their work behavior.

Zoom Call - Zoom is a Video Communications company that provides remote conferencing services utilizing audio and video for one-on-one meetings or several participants simultaneously.





Work
until
your
idols
become
rivals

