

# Working With Virtual Assistants



## On-Line Video Course

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### SESSION 2: FINDING & USING A VA

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[WWW.WORKINGWITHVIRTUALASSISTANTS.COM](http://WWW.WORKINGWITHVIRTUALASSISTANTS.COM)

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# SESSION 2: WORKING WITH VIRTUAL ASSISTANTS

1. The 80/20 Rule
2. Defining - Tasks, Technology & Time
3. Writing A VA Proposal
4. Setting A Budget
5. US vs Internation
6. VA Resources
7. Getting Started?
8. What's Next?

## WORKBOOK

- Notes
  - Takeaways & To-Do's
  - Power Questions?
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# PART 1 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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# PART 2 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_

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# PART 3 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_  
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# PART 4 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_

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# PART 5 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_  
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# PART 6 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_

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# PART 7 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_  
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# PART 8 - TAKEAWAYS & TO-DO:

*This section - Write down your five actionable takeaways from your answers and notes*

Key Thought	Actions or To-Do Items - List Them	Rank 1-5 1 = Do 1st

Final Thoughts: \_\_\_\_\_

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# SESSION 2 - COMPETENCY QUESTIONS

What are all the tasks you do in the following areas of your business?  
 Which of these task or sub-tasks are good candidates for outsourcing to a virtual assistant?

<b>Business Area</b>	<b>Tasks</b>	<b>Tasks that are candidates for outsourcing to a VA:</b>
Writing, Blogging		
Accounting		
Booking Appointments		
Follow-Up With Clients		
Research		
Social Media		
Technical Updates To Website		
Email Management		
Support Ticket Management		
Real Estate Or Other Listings		
Marketing		
Other:		
Other:		
Other:		

What are your technology platforms?

How important is it for your VA to be on the platform and an expert in this? Complete this chart for each task you want to outsource.

<b>Technology Type</b>	<b>Your Platform or Product</b>	<b>Degree of Access and Familiarity Required: 0 = Not Needed 10 = Full Mastery</b>
Computer System: Mac or PC?		
Word Processing		
Spreadsheets		
Presentation Development		
Email; Mass Email		
Website		
Contact Management		
Contact Relationship Management		
Document Storage		
Document Sharing		
Webinar Platform		
Video Platforms And Editing		
Graphic Design And Editing		
Other:		

Complete the following return on investment analysis for each task you want to outsource:

Task: \_\_\_\_\_

Number of hours you currently take to do this each month: \_\_\_\_\_ hours/month

Your billable rate: \$\_\_\_\_\_ per hour

The number of hours per month for a virtual assistant to do this:

\_\_\_\_\_ hours/month

Hourly rate for VA: \$\_\_\_\_\_ per hour

Monthly budget for VA for this task =

VA hours x VA hourly rate = \$\_\_\_\_\_/month

How many additional hours/month could you BILL if you did not do this task?

\_\_\_\_\_ hours/month

What percent of your billings do you collect? \_\_\_\_\_%

What is your total additional income from using a VA?

= Additional BILLED hours x your hourly rate x % collected = \$\_\_\_\_\_

What is your net profit increase?

= Your total additional income - monthly budget for VA = \$\_\_\_\_\_

If there is not a net increase in profit, is the time gained worth it to you anyway?

\_\_\_yes \_\_\_no

The proposal:

The specific task: Include details as bullet points.
General skill sets needed:
Required technologies and degrees of proficiency:
Expected number of billed hours per week/month/full project completion:
Expected duration of the project:
Anticipated fees:  Hourly rate range            \$ _____ to \$ _____ / hour Weekly or monthly fees:    \$ _____ to \$ _____ / month Total project fee:            \$ _____ to \$ _____ / completed project
General information about your business, location, types of clients and any other relevant details:
Do you need general clerical help, or a specialist?  Do you need a virtual assistant coordinator to coordinate multiple VAs?
Reality check: Is your task clearly defined? Is it reasonable?

International Considerations:

Language and communication between you and the VA:

Do you clearly understand each other?

Is it a problem if the VA is not familiar with slang or colloquial phrases?

If there is a team of VAs, is your contact person able to translate your instructions adequately to staff?

Language and communication with the public?

Does this task require communication with clients or the public?

Is accented English a problem in verbal communication?

Is English syntax a problem for written communication?



Logistics:

Are time zone differences a problem?

Are time zone differences a problem if you have team meetings?

Type of work:

Does the task require strong language skills in English?

Does the staff have the background and experience to do the task?

Is speaking a different language an advantage, given your task?

## Cost

What is the cost difference between local and international providers?

What is the relative efficiency?

Does a domestic or international VA make the most sense for this task?

## Resources to research:

Agencies: Do you need to coordinate multiple specialist VAs? Is this worth the extra cost for you?

What resources are available through local associations? Is it important to you that your VA have a certification?

Do online resources such as HireMyMom.com, Odesk, Elance or virtualassistants.com have suitable candidates for your tasks?

Getting Started:

- Interview candidates via phone, email or skype
- Establish a trial period to determine if the relationship will work.
- Consider giving several candidates the same task, to evaluate their effectiveness.
- Decide if you will get a non-disclosure agreement or contract
- Set expectations regarding responsiveness, deliverables, etc.
- Establish a schedule for reviewing the VA's work and providing feedback.
- Evaluate tools for managing task assignments and monitoring progress, such as base camp, Asana and fresh books.

