LET GO, BE FREE!
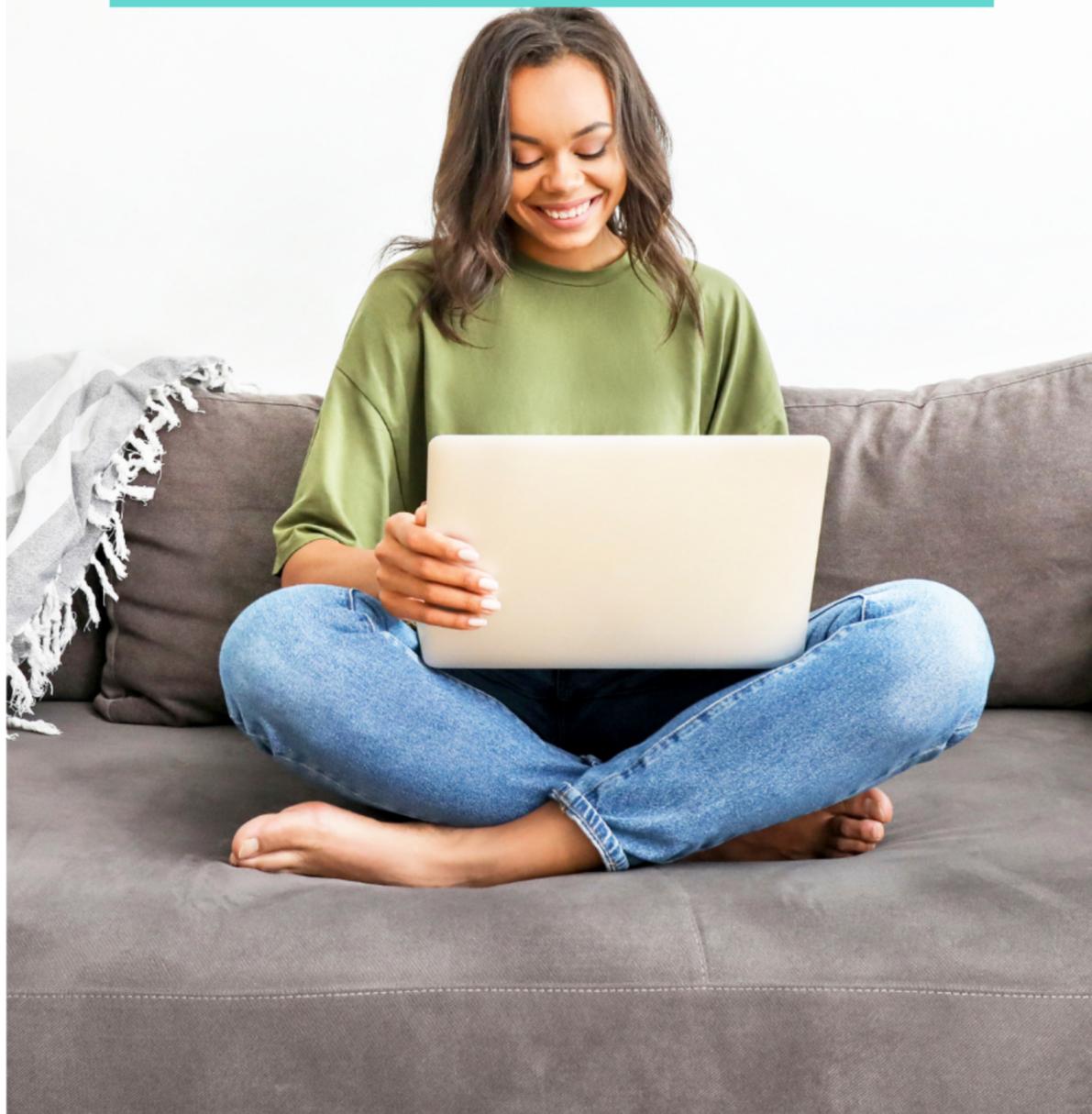
RHENA JEAN LUBAO

5 Essential Steps To-Do Before
Hiring a Virtual Assistant

contents

LET GO, BE FREE!

INTRODUCTION

One of the hardest things to do when you have been a solo entrepreneur for a while is to let go of some business tasks you just can't trust anyone to do right. This is most especially with the task that has to do with your business branding such as social media content curation and posting.

I know a lot of contractors who are afraid to outsource and delegate client tasks because they fear the quality of their work will deteriorate.

I can't blame them as this would likely happen if you jump into hiring a Virtual Assistant without setting up your VA onboarding process yet. Two things could happen, either you overwhelm you both with task load or bored your new VA because you are unable to pass on tasks as quickly as you want to.

INTRODUCTION

Fortunately, there is a faster way to onboard and train your new VA. You don't have to spend more time than you must, losing business opportunities just to orient a new hire. All it takes is to dedicate one week of your time and get the most out of your VA work to help you grow your business.

So if you want to run and grow your online business and still have the FREEDOM for other things that you are passionate about, LET GO and check out these 5 guidelines to onboard virtual assistants efficiently and get the most out of your VA at the soonest possible time.

"You have the power to protect your peace.
Be gentle with yourself."

- AVERY DAVIS

1 MINDSET

How is your task delegation mindset?

Everything starts with you as a leader.

It does not count how many VAs you hire for your business. If you remain the bottleneck of your enterprise, you will still be running the business all by yourself. Additional VAs will only worsen the situation because you will have to manage more people. That is why it is important that you open yourself to a delegation.

As much as you wanted to do things on your own, here are 3 types of tasks you have to let go:

- **Tasks you love to do but are time-consuming.** These are the things that prevent you from doing that ONE THING to innovate your business and take it to a higher level. Do not be tied down from growing your business. Delegate such tasks.

- **Tasks that you are not great at**. If you are a new entrepreneur, you need a website to introduce your business to the world. However, you are not a web developer. Let someone take over and manage the website for you. Do not waste your time. Get an expert and enjoy a fast Return-On-Investment.

- **Tasks that you hate doing but needed to be done to move your business forward.** There are a lot of tasks that you need to routinely do on a daily or weekly basis. Start delegating them. The moment you unload yourself from those tasks, you will feel freer and more passionate to propel your business' success.

2 TASK PREPARATION

What are the top 5 tasks you want to delegate asap?

Task identification is defined as understanding your business process. With this, you are able to identify the different tasks. This will help you find the right Virtual Assistance based on the skill they have.

There are actually two general types of VAs. They are Tech VA and Admin VA. Tech VAs can grasp integrations, data flow, and processes quite easily than Admin. On the other hand, Admin VAs can research, work on data entry or even answer a client's email better. Also, on a side note, when I say VAs, techs, or admins, these are the type of online workers who are like Santa's elves. They will work and rely heavily on instructions from your Project Management Tool and knock your assigned tasks right away as soon as they see it and understand your requirements. They are not like Specialists Project Managers or VAs who maintain niches and are considered experts in their field. Instead, they are those people who will wait for project plans ready for implementation.

When looking for someone to hire, you need to be clear on what tasks or projects you want to outsource and what would be your role as the task manager. You also need to have an idea of what type of VA is perfect to accomplish this task. This is very important especially if you are on a tight budget. You don't want to end up hiring the wrong skillset from a VA.

❝ *"You have the power to protect your peace. Be gentle with yourself."*

- AVERY DAVIS

2 **TASK PREPARATION**

What are the top 5 tasks you want to delegate asap?

Here is an example on how you may do it.

AREA: TASK NAME	DESCRIPTION	TYPE OF VA - FREQUENCY
SM: Posting Content	posting content on pages, groups, other SM channels	Admin - weekly (1-2x)
SM: Preparing Images	Creating images for SM posts content	Admin - weekly (1-2x)
MARKETING: product monthly campaigns	I have a product that I have a webinar event monthly. I need help on the funnel set up, integrations and reports on (state the app you use)	Tech - monthly
MARKETING: creating freebies	I need pdf files for my freebies	Admin - occasionally, as needed - on average every 2 months
MARKETING: List Management	I send out email blast weekly to a certain list and tagged them afterwards. Needed this to be set up every Tuesday	Tech - weekly
WEBSITE: blog posting	I post blog content with seo and image preparation twice a month.	Admin - bi-weekly

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- AVERY DAVIS

3 SOP

How is your Standard Operating Procedure?

Documenting your process in a form of SOP is an investment for your business. It is chaotic and growth-defeating to run a business without operating procedure.

Remember the 5 tasks of identification and then segregation, the next step is to prepare a video for each of these tasks. These videos will show how you want tasks to be done. It can also serve as a training manual so you will spare yourself from explaining and demonstrating every time you hire a new VA. Plus, you can also use these tutorial videos for another online business if you wish to enter into another business again.

Once you hired a VA, ask your VA to create a manual out of these Videos (if you don't have any yet). This can be the first project you can give to your new VA.

3 SOP

How is your Standard Operating Procedure?

There are a lot of advantages if you let your new VA document their implementation of the tutorial videos you prepared. Here are some of them:

- Right up front, you are duplicating yourself and your VA. In case your VA is no longer with you, the SOP document the VA created will serve as training material for your next.

- Right at the onset, you will see that your VA understood the process. Through the SOP being created, both of you will have a full understanding of how well you both communicated the task.

- This will get off all the stressful emotions out during the onboarding phase. Both of you and your prospective VA have somewhere to start on your project planning. Your VA won't have time to waste waiting for you to clarify instructions. Your one-week or one-month tasks and instructions are already prepared. This will give you ample time to prepare the next batch as your VA is working on the SOPs.

- Imagine, when your VA is at loss with something on the project and you are also busy with your own thing. Yes, you do not want to be bothered by a lot of questioning. Spare yourself from the possible drama.

- You will always know what your VA is up to while you are working on other important business stuff.

4 PROJECT MANAGEMENT

Do you have a Project Management Tool Prepared?

I found that having a **Project Management Tool** can efficiently deliver better results. It motivates team communication online. Because of better and more open team communication, increases productivity.

Here are some points to consider when choosing a project manager tool:

It must be aligned with your business size, industry, and type of clients. Do you manage clients' projects? Are you selling tangible products, or managing an e-store where you don't have to interact with clients for a project? If you are managing a small team and you don't need to set up folders and subfolders for clients' big projects, Slack or glip will do for tasks assignments, and discussions. But if you manage a client's project as well where time needs to be tracked, a PM-like Teamwork works best.

Make your PM simple enough to manage. I tried Wrike, ASANA, Basecamp, and FreedCamp. I settled on glip integrated with Trello. I found that my team and I want to see our task right away without digging into projects and folders. With a glip, everything is just one click away.

It must be cost-efficient. There are a lot of free PM tools like a bucket, Trello, and glip. If you are managing just your business tasks, you don't need to buy PM tools for your task management. Go FREE. Try out the features first.

4 PROJECT MANAGEMENT

Do you have a Project Management Tool Prepared?

Reminders:

Be sure that your PM have the features you need for your business needs.

For more information about project management tools, you can check out a LinkedIn article I wrote a way back.

Online Business StartUp Owners: How to Set Up a Virtual Office

"You have the power to protect your peace. Be gentle with yourself."

- AVERY DAVIS

5 COMMUNICATION

Have you thought about how can you express yourself?

For cost efficiency, most business owners hire VAs from India, Philippines, and other countries where the cost of living is lower than their own. One of the cons of hiring someone from the other side of the world is communication.
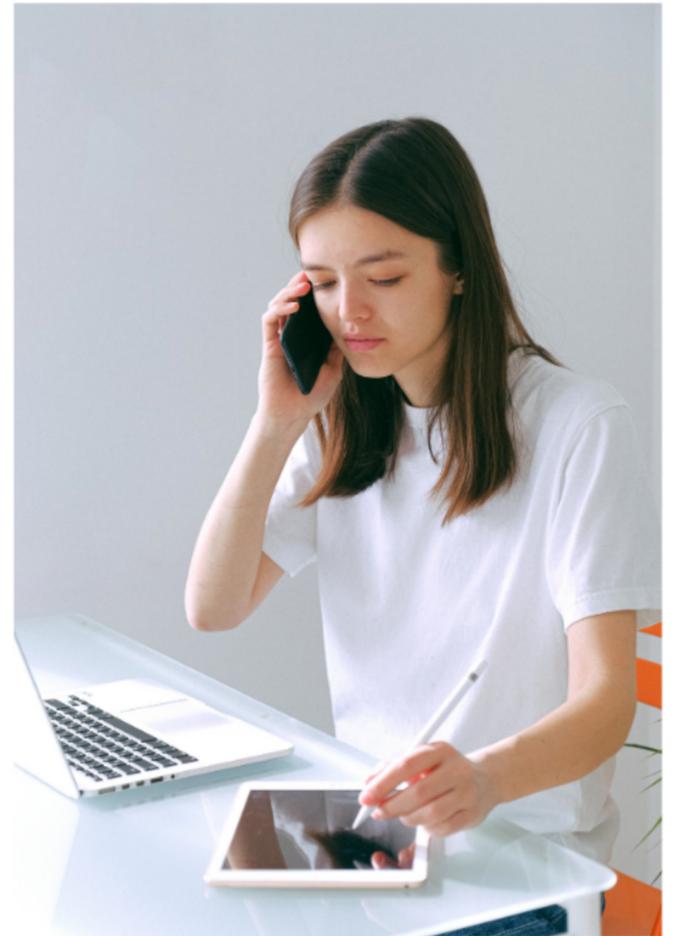
For cost efficiency, most business owners hire VAs from India, Philippines, and other countries where the cost of living is lower than their own. One of the cons of hiring someone from the other side of the world is communication.

Communication is really important, especially when you want something done. Talking, daily video call,s or even chatting does not truly make a communication process efficient.

In this virtual office, you would need to be clear about what output you need from your VAs. Here are some important points you need to do.

- **Be sure your VAs understands your business jargon.** You'd be amazed just how one word meant differently for you. I talked to a prospect once, telling her my services are either part time or fulltime. When I said full time, I meant 8 hours' worth of work daily. On her understanding, fulltime is working for her exclusively not only for 8 hours but she wants to be the only client. See how one word can mean another to someone else. That is why it is best to be sure you are using words where both you and your VA truly understand the meaning.

5 COMMUNICATION

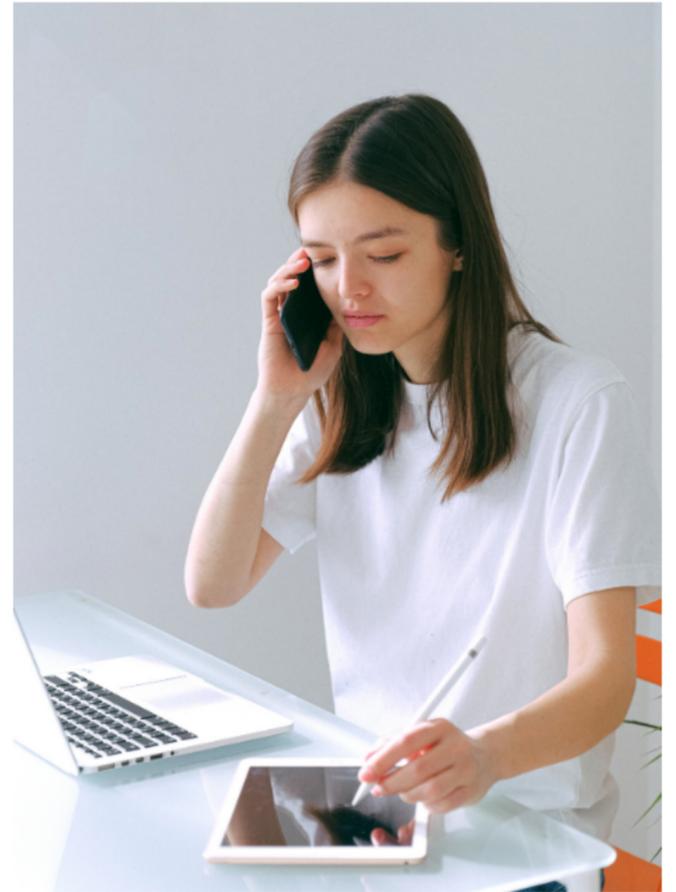Have you thought about how can you express yourself?

- **See to it that your tasks are categorized and prioritized properly.** This way, your VA will know what task to accomplish and focus on first. REMEMBER, focus means 100% attention to detail. As mentioned in

Guideline #2 in task identification, you need to specify if the task is a routine or a special task. When assigning routine tasks, all you need to do is state the task name along with the SOP link your VA prepared.

For special tasks, on the other hand, you would need to prepare a sample for it every time you give instructions for this kind of task. A bit of effort is applied to ensure you are well-understood. Find a way where you can template how you give instructions for this kind of task. Don't forget to specify a due date for your tasks!

This shows urgency and cultivates responsibility. Just be sure that you don't set all tasks URGENT within a day! You have to be realistic about your task priorities. Don't just assign tasks and expect all of them to be done in a day especially if your VAs job description is somewhat JACK OF ALL TRADES.

It can take around 20 minutes to shift the mind from Social Media Posting to building your Sales Funnel. This is why, if you do not want to lose track, be clear about which task needs to be done first and how soon you would need them.

⑤ COMMUNICATION

Have you thought about how can you express yourself?

- **Be consistent with the names and steps of your tasks.** Align the name with the outcome of the tasks. E.g. you have a data entry task of adding a product to an e-commerce platform, be sure you name the platform following the outcome you need.
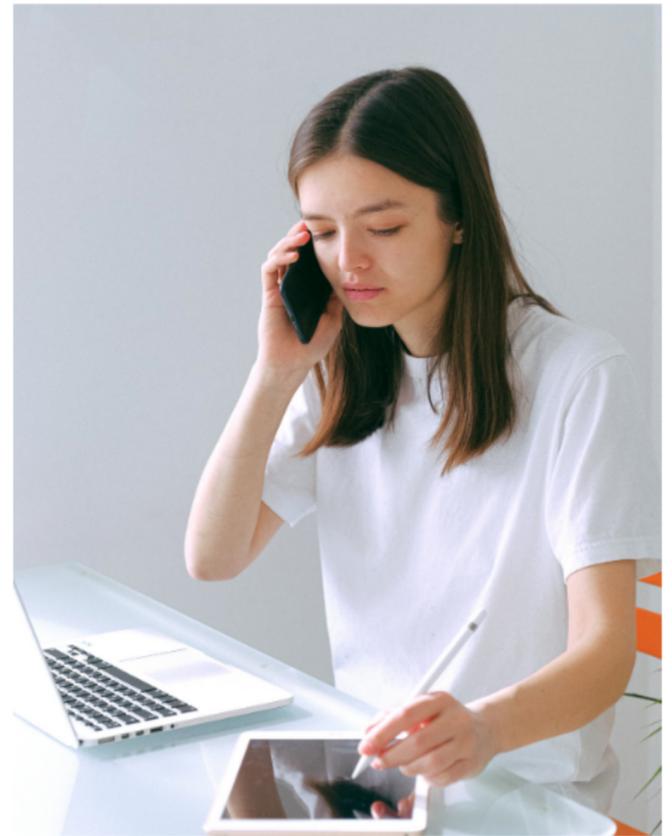
Sample:

Magento: Adding Product Details to Product Catalog.

This way, your VA will understand outright what needs to be done and next time, it is easier to remember what this task is all about. Just be sure that when you are assigning this task, you gave the same details of input or resources. If there are other sources of input, be sure to mention them in your training material.

Also, once your SOP for this task is done and you have trained your VA to do this, don't change how you call it the next time you assign it or add some steps suddenly without informing or training your VA about the new step, and updating the SOP.

You could save a lot of time by eliminating confirmations about task instructions and resources. If you can't come back right away to confirm, your VA might spend slack time – doing nothing and waiting for further instructions.
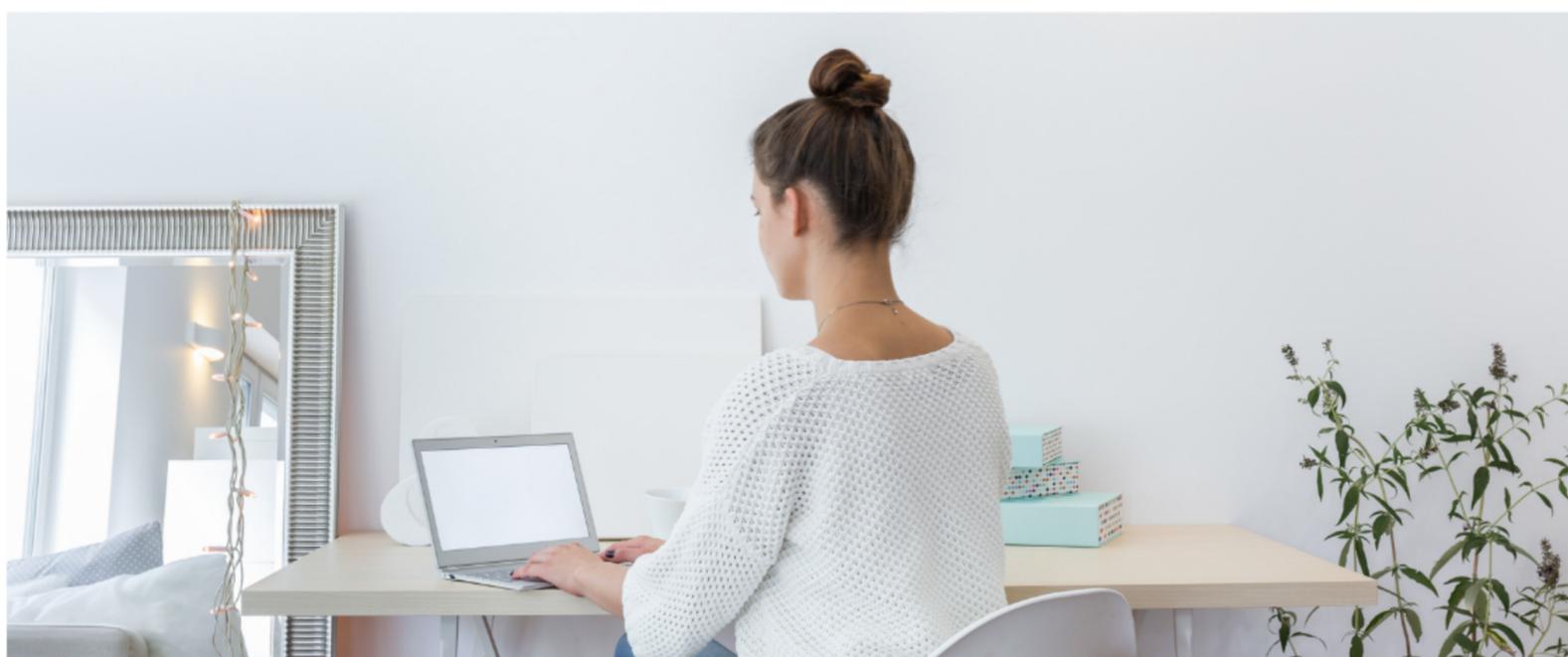
> *I know as an entrepreneur, you are busy. Hey, you hired VAs to help you. And you would want them to get started ASAP.*

However, no matter how EXPERT, GREAT, or AWESOME your VAs are, if they are newly employed under your care, it would take time to get familiarized and comfortable with your operations.

That is why, when hiring a new VA, you need to have a proper onboarding process ready.

Apply these 5 guidelines and you will be able to fast-track your new virtual assistant's onboarding and training. As a result, you will be able to have more time to structure your business and reap the rewards as an online entrepreneur at the soonest possible time.

Have the right mindset, choose the right VA, and use the right tools to grow your business.

Are you ready to onboard and manage a team of VAs and leverage their skills to grow your business to the next level?

Let's talk! Book for a discovery call today!

About Jean

Rhena Jean Lubao is an Online Business Operations Specialist. She helps SMEs build their business dream from ideas to implementation by creating and streamlining their processes and providing them with talented individuals who can consistently help them scale to the next level.

Jean and her team work closely with coaches, speakers, digital marketers, agency owners, and small business owners who are feeling stuck and overwhelmed in their business progress.

As an owner of her own Virtual Assistance business, **Accelerator Virtual Assistance Solutions**, Jean understands the journey her clients go through.

She developed the following Solutions to accelerate the growth of her client's business:

1. **TMS** (Team Management Solutions) - An end-to-end VA matching and Remote Staff Management Service designed for small business entrepreneurs who are running their business online and are in need of support in building their business assets, developing a team of high-performer staff, and managing daily operations!
2. **OBS** - A specialized Online Business solution focused on specific output needed by your business. All packages include an Account Manager to ensure that no tasks are left behind.
3. The **BOSS** Method - or the Business Online Simplified Structure, is a method created to streamline your business operation processes so that you can avoid the overwhelm and stuck in your business journey. As a result, you will be able to enjoy the return on your investment at the soonest possible time.

LET'S KEEP IN TOUCH

VISIT US AT: WWW.AVAS.PRO

Book a discovery call today!