

So what is a Virtual Assistant?

According to Wikipedia:

A virtual assistant (typically abbreviated to VA, also called a virtual office assistant) is generally self-employed and provides professional administrative, technical, or creative (social) assistance to clients remotely from a home office

My name is Michele Ibbs and I have been running I'm Your P.A. Limited since I started it in 2007. Over the years we have worked with over 400 businesses and these days have approximately 100 on our books at any one time. Our team specialises in call handling and customer service, we also work alongside other VAs who specialize in Social Media, transcription, book keeping and pretty much anything you can think of.

Our business is very much values based, we believe that working with us should be Fun, Profitable and Rewarding for Clients, Staff and their respective families. Whilst I believe VAs should be professional, it is also most important that they are honest, kind and have a sense of humour! Let's face it, they need to be straight with you and tell you if they cannot do something, most of us appreciate being treated with kindness and if you can't smile whilst you are working – it makes for a very long life, let alone day!

I hope this ebook will help you to decide whether working with a VA can assist you to get a better work / life balance and grow your own business. The chances are that if you have any queries I will have dealt with them before, so please give me a call.

Virtually Yours

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When is it the right time to hire a VA?

It's a rare thing for an business owner not to feel overwhelmed and as though they are wearing all the hats and doing all the tasks alone. But when is the right time to hire a VA, or do you really need one? In this short ebook we will look at the reasons you might choose to hire a VA or what you can do yourself to avoid the need to hire a VA.



Firstly you need to look at a list of all the tasks that you could delegate or you really don't like doing – these are the ones that suck all the energy out of your day to day life! You can't possibly grow in business when you feel as though you have a ball and chain around your neck!

As you create the list, don't think I can do this better than anyone else, I can do this faster, or I should be doing this – therefore I won't delegate this task. Ask yourself – should I really be doing this task myself?

How much is your time worth?

I spoke to a builder who told me he did all his own quotations and followed them all up personally - it took him about half a day a week as he struggled to type them up.

Looking round I saw some beautiful block paving – “I can do that” I said, he was impressed! “It will take me about two years” I told him - he laughed, “that's about a days work” he replied! He could earn about £150 for doing it - for us to sort his quotations and follow up would cost about £30 - because we know what we are doing! He could earn more by asking us to do what we are good at!

So think how much is your time worth?!



Personally I will not do my accounts, I am more than capable of doing them but it seems to take me forever and by the time I submit them to the accountant at the year end, if I have made a mistake in month one, it has just escalated! (Plus I don't like doing them!) I have outsourced all the book keeping and wages to

an accountant – I know the time this has saved me has allowed me to work on the business, do more networking AND have a life!

What tasks might you delegate?

So now we are going to tick off some of the tasks you could delegate, feel free to add your own.

Typing	<input type="checkbox"/>	Call handling	<input type="checkbox"/>
Mail merging	<input type="checkbox"/>	Customer service calls	<input type="checkbox"/>
Audio Typing	<input type="checkbox"/>	Sales calls	<input type="checkbox"/>
Copy Typing	<input type="checkbox"/>	Appointment making	<input type="checkbox"/>
Data entry	<input type="checkbox"/>	Book keeping	<input type="checkbox"/>
Reports writing	<input type="checkbox"/>	Raising invoices	<input type="checkbox"/>
Proposals	<input type="checkbox"/>	Debt management	<input type="checkbox"/>
Manual configuration	<input type="checkbox"/>	Web design	<input type="checkbox"/>
Tenders	<input type="checkbox"/>	Web site maintenance	<input type="checkbox"/>
CVs	<input type="checkbox"/>	Marketing	<input type="checkbox"/>
Desktop Publishing	<input type="checkbox"/>	Facebook	<input type="checkbox"/>
Design	<input type="checkbox"/>	Twitter	<input type="checkbox"/>
Flyers	<input type="checkbox"/>	LinkedIn	<input type="checkbox"/>
Brochures	<input type="checkbox"/>	Pinterest	<input type="checkbox"/>
Newsletters	<input type="checkbox"/>	Blogging	<input type="checkbox"/>
Excel	<input type="checkbox"/>	Other social media support	<input type="checkbox"/>
PowerPoint	<input type="checkbox"/>	Managing on-line adverts	<input type="checkbox"/>
Diary Management	<input type="checkbox"/>	CRM system set up	<input type="checkbox"/>
Conference Organising	<input type="checkbox"/>	CRM system management	<input type="checkbox"/>
Database creation	<input type="checkbox"/>	<input type="checkbox"/>
Database management	<input type="checkbox"/>	<input type="checkbox"/>
Database cleansing	<input type="checkbox"/>	<input type="checkbox"/>
Developing Procedures	<input type="checkbox"/>	<input type="checkbox"/>
Research	<input type="checkbox"/>	<input type="checkbox"/>

Ok now you have a list of tasks that you can delegate – and yes you are no doubt still thinking “I can’t hand that over” YES you CAN! Once you have the right VA you will be staggered at what you can hand over. Now you have to look at your budget.

When considering how much you can afford to pay for a VA, don’t forget to take into account that the time you save will allow you to earn more and do the things you like doing best!

What are the benefits of using a Virtual Assistant?

There are loads of benefits for using a Virtual Assistant (VA) rather than employing another member of staff, or if you run a home based business, bringing an assistant into your home to work with you.



A VA uses their own desk, computer and phone and they pay for the maintenance of them! They also use their own heating, electric, tea, coffee and toilet paper!

With a VA you can allocate work on a per job basis, just get them to work the hours you need, rather than fixed hours every week

VAs have different skill sets – so you can hire the best one for the particular job – many people have several VAs – some will do social media and marketing, others will do book keeping and spreadsheets or research. There are a few VA companies that will do personalised call handling and diary management.

VAs are all business owners in their own rights, so they appreciate the complexities and day to day battles that their business owner clients are going through.

VAs work on a consultancy / sub-contractor basis – so there is no national insurance, sick pay or holiday pay to find – just one bill! Often there is no tie in either, so when the job is complete there is no need to worry about further costs.

Check the long term contracts, there is no need to get tied in to lengthy contracts, a good VA company will understand that if they do a good job, you will stay if you have additional work, if the job is not up to standard, they don’t

deserve your business! It is always worth asking how long their longest client has been with them.

All sounding good? So what are the drawbacks of hiring a V.A.?

Not all VAs are created equal! When you take on a VA you really don't want to be paying for the privilege of them learning how to do your work. Remember there are some that are very new to the industry, if they have just left employment they may not understand the world of the business owner!

Many VAs set up in business as a lifestyle business to work around children – there is no problem with this, as long as your project isn't time sensitive or needs completing during the school holidays or when the children are sick, their hours can be quite limiting. Do they have backup? If they cannot do your work personally – who will?

Some VAs have excellent customer service skills, others just don't have a clue! Again if your work is all research or book keeping, it probably isn't going to be an issue. We have a big focus on call handling, diary management and anything customer service – following up on quotations, chasing outstanding invoices, managing databases and a large number of other things – however I will always point my clients to other VAs to do social media, book keeping and transcription – we know our strengths and those of the other VAs we work alongside. Make sure you interview and get the right skill mix – not just someone cheap who is desperate for any work they can get, but actually doesn't really know how to do it!

Some VAs seem to think they can “partner” you in your business – make sure you set clear boundaries with your VA before you start, you really don't want them to start taking over and making decisions that could negatively impact on your business. If in doubt always get them to draw up a service level agreement, a VA worth their salt will have no problem with this.

What Should You Consider When Hiring A VA?

- **Click.**

There has to be a "click" between the VA and you. You want someone who is friendly, enthusiastic, and detail-oriented, with extraordinary customer service and follow-up skills. They should be confident without being arrogant, articulate, a good listener, and comfortable to speak with.



- **Professionalism.**

Does the VA answer her own voicemails and emails in a timely manner?



Do they answer their business phone professionally? Do they answer their business phone at all? Do they have staff to deal with your needs or are they working alone? Sometimes this may not be a problem, it depends whether your work is time sensitive. If they promise to send you something, do they do so? Do they treat you with respect? If they treat you well in your initial conversations, then it's likely they will treat your customers well, too. (After you hire a VA, it never hurts to follow up with customers and ask them how your VA treated them.)

- **Project Management.**

It also helps if the VA has good project management skills. Over time, you are going to be giving them a huge number of tasks and you need to know that they can juggle all these tasks, understanding priorities and deadlines, while also juggling the needs of other clients.

- **Technology Skills.**

Most self-employed people rely upon technology to help run their business, from QuickBooks, to websites, to Microsoft Word. Using technology can help your office run efficiently and save time and money. With this in mind, it's critical that your new VA have excellent technical skills. Ask them what software products they use, and how well they know them. Make sure your new VA uses the same software that you are using, so that you can share files. If you have a website, ask the VA if he knows how to do website maintenance (and ask how many websites they currently maintain). If you have technology associated with your website, like an online shopping cart, ask the VA if they know how to maintain your specific shopping cart. Finally, if your VA needs new software to be compatible with your own systems, determine who is responsible for paying for this specialised software.



- **Skill Set.**

There are many, many tasks that you can delegate to your VA. It helps if you have a list of tasks you want your VA to perform, and make sure during the interview process that you review that list with a potential VA to determine if they can do all those tasks. Are they prepared to recommend other VAs to assist with the tasks they cannot accommodate?

- **Image.**

Take a look at the VA's website. Are all the words spelled correctly? Is the grammar acceptable? Does it have a consistent and neat look? A VA who doesn't pay attention to their own website probably won't pay attention to your work either.

- **Availability.**



Does the VA work full-time or part-time? Are they available evenings and weekends (if that's when you work)? What time zone is the VA located in? VAs that work part time have a role to play, but they will not be of use to you if all your work is to be carried out in the normal working week.

- **Experience.**

It's important to determine how long the VA has been doing this type of work. While it's helpful to know how long they have been a VA or an administrative assistant, it's more important to learn how long they have done the tasks that you want them to do. Remember that professional VAs specialise in particular areas, that may be trades, legal, medical, financial services, property – it is important that your chosen VA specializes in your field. There's always a bit of a learning curve as a VA learns your particular business, but you shouldn't be paying for her to learn new skills unless they're unique to you and your business.

- **References.**

Can the VA give you a list of people whom you can contact who will tell you about working with them?

How Much Should You Pay For A VA?

Some VAs charge by the hour, some work on a monthly retainer basis (a certain number of guaranteed hours per month). Charges may vary for specialist skills like book keeping, website maintenance, legal or medical transcription



In my research, I've found the range to be £10.00 - £55.00 per hour depending on experience, skill and location. Even call handling charges range from £1.00 per call to £3.50 per call. This is one field where you get what you pay for, so if you need a highly skilled VA, pay the money, and get the best.

A virtual assistant who prices themselves too cheaply may be a sign of a low skill set, lack of self worth, or just plain poor business strategy. Any business owner who prices their services too low, automatically sets themselves up for cash flow problems, the leading cause of businesses failing. You want to make sure your VA is around for a long time to serve you. This is a person who will save you time so that you can spend that time making more income for yourself. I often speak to new VAs about their charges recommending around £30.00 per hour, interestingly the ones that insist on charging £10.00 per hour barely last 6 months in the industry.

Also consider that you might hire multiple VAs with specific skill sets. For example, hire one who focuses on your call handling, database management and the customer service side of your business, another for bookkeeping and another who focuses on your digital marketing and social media campaigns.

How to Find a VA

While you can use an online referral or directory to find a VA, I would recommend you first ask for referrals from other small business owners. Hiring a VA is a very personal decision and it's good to have someone to talk with, who can tell you about a particular VA's strengths and weaknesses before you call to interview the VA.



Finding the right virtual assistant for you is an important task; give it the time and attention it deserves. Whether you ultimately choose to hire one VA to do all your tasks, or multiple VAs with special skill sets.

Make sure you get it in writing:

- how much you will pay
- how many hours a week or month the VA will work
- can you contact them out of hours if necessary
- how often you will be invoiced
- is there a confidentiality agreement,
- what happens when the VA is on holiday
- what cover is available if the VA is off sick
- what insurance is in place
- what computer back up systems are in place / disaster recovery plan
- any service level agreements
- references

Remember they are going to be working on and in your business – you have every right to ask!

Then start delegating those tasks!

So maybe you prefer to go it alone.

Here are a few pointers that might help you to manage without a VA – there are things you can do to make life easier, and in the future they will enable you to hook up with a VA.

How do you answer that call?

How you answer the phone says a lot about your business. It may sound like the simplest of things to do, but taking calls to give the best customer experience is an art in itself – here are a few tips to ensure that your potential new clients get the best experience possible.



- Always make sure that you are totally with the call – not being distracted by anything else
- Smile before picking up the phone – everyone can hear a smile!
- Check the clock – good morning or good afternoon is a great greeting – much nicer than a gruff “Hello”!
- Good morning / good afternoon XYZ Company, how can I help you?
- Take the clients name and company name – check spellings if not sure, there’s nothing worse than referring to someone by an incorrect name
- If it is a new enquiry, ask where they heard about you – it pays to know what advertising is working
- When taking a number down check the digits – most numbers are 5/3/3 or 4/3/4 e.g 07971 000 111 or 0121 345 5678 – it’s a great way of checking you have all the digits
- When you have all the details you need thank the person genuinely for their call, refer to them by their name, it reinforces that you took note of it.
- If the caller says thank you – tell them they are most welcome

If you treat your callers with respect and professionalism, they will remember the experience and are far more likely to want to work with you. If you are deep in thought working on your business, it is unlikely you will appreciate the interruption of a telephone call, the potential client will no doubt hear that in your voice. If you have to divert to a mobile, callers will know that it is unlikely

that you are going to be able to take all the information down, you are concentrating on other things.

Taking all your own calls

These days everyone in business seems to be so busy, making money for most means physically doing something other than being on the phone. Telephone interruptions can be the bane of a business persons life, yet without calls from clients, both potential and existing, the business is sure to fail. So what is the answer?

Mobile Phones

- Many people will just use a mobile phone for business, especially if they are a sole trader, others will divert their landline to a mobile number, but there are a number of pitfalls to be aware of with this.
- Firstly reception is important, making sure that you have the right provider to maximise coverage.
- Secondly it is important for the calls you cannot take that you have a clear voicemail which states the name of the company and your name, So many people leave their voicemails set as the phone providers default message, remember over 67% of all callers reaching a voicemail do not leave a message, this is far higher if their is no personalised greeting
- Thirdly be prepared to leave the phone on silent whilst in a meeting. This includes ensuring it is not on vibrate. Constant interruptions in a meeting can look totally unprofessional whilst constant interruptions whilst working can lead to mistakes. It is a decision that we have to take, take the call and risk jeopardising the current situation, or miss the call and risk losing future business.
- Finally don't use call waiting, whilst it might be useful if you are on the phone to a friend and a business call comes in, it is completely distracting when a second business call comes in.

VOIP Systems

These are numbers answered on a telephone that is run over a broadband internet

- There are many providers of landline numbers these days through VOIP systems – all you need is a broadband connection. Some charge massive set up fees – set up fees should be minimal between £0.00 and £45.00.
- If using a VOIP system, check you can keep the number.
- Check the call rates and are there any minimum charges?
- Check line rental fees – these vary from £2.00 per month to around £50.00 per month
- Check if you are having a telephone that you are not being charged a monthly rental fee. Some companies will charge £30.00 to £40.00 per month, when a new phone can cost as little as £100.00 to purchase outright!
- Ask how many times the system has failed in the last twelve months, some systems have been known to be down for in excess of 3 days
- If you want more support on VOIP systems we are happy to connect you to our providers.

Landline numbers

- Landline numbers certainly make the business look larger, however what if there is no-one to answer the call?
- Consider using a VOIP phone system, calls can then be transferred relatively cheaply to the mobile, or the mobile can be used as an extension of the landline. Voice messages can be emailed directly to the mobile when out of the office, this saves the time delay on getting back to callers at the end of the day, when potentially they may have found someone else to do their work.
- Answer machines are often used, these can work well, but as with mobile phones, it is very important to ensure that the message is personalised and not just left as the standard automated message. An answer phone system which allows for retrieval of messages remotely is beneficial, at least that way you won't have to wait until the end of the day to speak to callers.
- Remember that research shows that over 67% of callers reaching an answering machine will not leave a message.
- Transferring of calls to a mobile phone can be very expensive with a number of telecom providers.

If you are struggling to take calls from clients and potential new clients, now is the time to consider reviewing your systems.

So you have quoted – who is following it up?



Many of us have to give quotations as part of our business, but so many times the quotations are not followed up – well let's face it we're British, we don't like to be pushy! The thing is potential new clients may get three or four quotations, if only two are followed up on, they may well think that the other two companies just were not interested. It was a wasted effort doing the quote to start with.

I signed up a new client because he enquired with 5 different Virtual Assistants, but we were the only ones to consistently follow up on the enquiry.

Here are a few tips for the follow up of quotations and enquiries:

- Make sure that you have a system for follow ups – Capsule CRM is brilliant for this, and is free for up to 250 on the database – it's still very cheap after that.
- Always log the quote on the database and schedule to follow up in two to three days.
- If the answer is no, find out is it no for now, or no forever.
- What is the drawback, is it money, timing or just they have questions, find out what needs to be done
- Appoint someone else to do the follow up. If the decision maker is calling the client will know that they can try and drive a bargain.
- If the price is too high, try and find out by how much and ask if it is possible to reduce it, would they go ahead? Don't promise anything, it might be that the boss is happy to give a little discount. It always helps if the caller is able to say to the client " I really can't promise anything, but let me see what I can do"
- If it is just no for now, ask if you can call back in 2 or 4 weeks – get permission and diarise it on your CRM system
- Dependent on the service it may be necessary to wait months or even years before getting the order, our longest was 4 years of staying in touch, but the final result was definitely worth it.
- Remember by staying in touch you are marketing your business, they might end up referring you to others

Consistent follow up pays dividends, if you don't want to do it, get someone else to do it for you

Getting your money in

You have done the work for your client and they are happy. You raise the invoice and hopefully the majority will pay on time – but there are always the few that don't!

Consider using Direct Debit, we bill varying amounts each month and over 75% of our clients pay by Direct Debit, it is so easy to set up, if you want to know how – call us on 01902 585 222



Paypal offers a free app that allows the user to take card payments on an iPhone, the fees are around 2.75% per transaction.

There are many other mobile card readers on the market that allow card payments for one off payments, ensuring that payment is made at the time of work being carried out.

What about those last few awkward clients? Trying to chase the money when you are the one responsible for the sale is very difficult and let's face it emotions can get in the way – it's your money!

🎬 Clients promise to put the cheque in the post – and don't.

🎬 They say they have paid by BACS – and don't

🎬 There is no-one available in accounts when you finally get through

🎬 They have 1001 excuses as to why they haven't paid and not one as to why they will!

🎬 All sounding bit too familiar? Consider using a family member, friend or a Virtual Assistant to chase outstanding invoices. Someone who has no emotion, is professional, calm and persistent – it gets results!

Database set up

Databases and CRM systems are a great way of setting up a system that can keep all your contacts in one place and allow you to track quotations, follow ups and annual service calls. We have used many systems over the years and find that Capsule CRM is the most cost effective and simplest to use.

Capsule allows you to:

- Manage Contacts
 - Create lists, categorise contacts, create custom fields, create reports
- Import contacts
 - Import all your contacts from one database or even multiple databases, even from LinkedIn
- Export Contacts
 - Simply export your contacts to back up data
- Managing Deals
 - Track all your potential sales enquiries and opportunities
- Manage Cases
 - Ensure that clients are followed up as you would want to be
- Tasks and Calendar
 - Link tasks with Google calendars
 - Receive emails when a task is due
 - Allocate tasks to others
 - Allocate tasks into the future with no fear of missing them
- Managing Tracks
 - Set a track to ensure that when one action is complete, the next is instigated
- Emails via the built in drop box
 - Store emails attached to the client
- File storage
 - Attach files to the client, quotations, contracts etc

- Accounts and billing
 - Link to Xero and have all your accounts simply at your fingertips
 - Integrated Apps to improve and simplify your business
 - Mailchimp
 - Wufoo forms
 - Xero
 - Capsule mobile
 - Have all your contacts tasks and notes at your fingertips on your phone
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I hope you have found this ebook useful, please contact us on 01902 585222 for more information or you can visit our website at www.imyourpa.co.uk or connect with me on social media.

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Michele x