

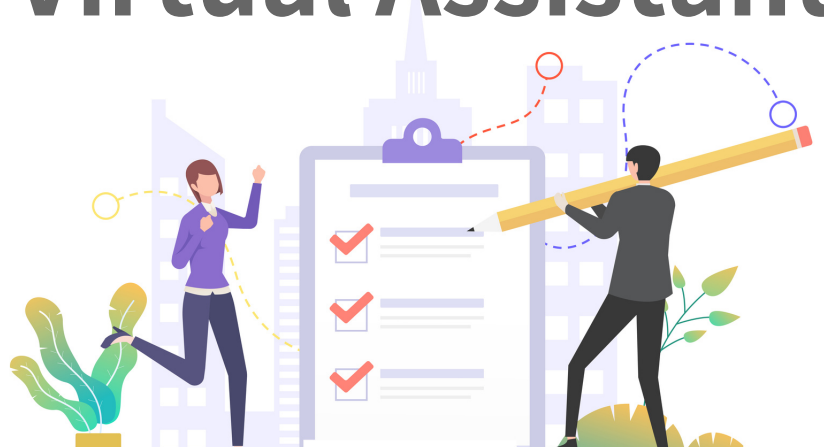
5

CRITICAL

Steps
TO
ensure

SUCCESS

**With Your
Virtual Assistant**



Follow these 5 steps to ensure success with your virtual assistant:

What

Know what you're going to delegate

How

Know how you're going to start delegating

Who.

Decide who will best support you

Delegate.

Work through the 6 Levels of Delegation

Expectations.

Set monthly goals based on realistic expectations



Kudos on taking the first step to work with your very own virtual assistant! And more importantly...what you need to do **BEFORE** you even get started to ensure a successful relationship!

We get it...you're already at max capacity which is why you're looking for help in the first place, and now you have to fit onboarding & training into your jam-packed schedule.

But if there's one thing we've learned over the last 20+ years it's that the more time you put in the beginning stages of onboarding with realistic expectations, the easier and faster you'll get up to speed with your VA.

So, let's get you started with the 5 critical steps to ensure success with your virtual assistant!



Step

1

Know **WHAT** you're going to delegate.

- Track your daily tasks for 1 week (sample tracker below).
- Looking at your tracker, circle or mark the tasks *only* you can do.
- Anything left can be delegated! We suggest starting with repetitive tasks and setting clear goals at each 30/60/90 mark.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
5:30 AM							
6:00 AM							
6:30 AM							
7:00 AM							
7:30 AM							
8:00 AM							
8:30 AM							
9:00 AM							
9:30 AM							
10:00 AM							
10:30 AM							
11:00 AM							
11:30 AM							
12:00 PM							
12:30 PM							
1:00 PM							
1:30 PM							
2:00 PM							



Step

2

Decide **WHO** will best support you.

- Identify what skills are needed for the tasks.
- Identify what, if any, software knowledge or experience is needed.
- Identify the personality-type that best supports you.

SKILLS NEEDED

**SOFTWARE
EXPERIENCE**

**PERSONALITY
TYPE**



Step 3

Know **HOW** you're going to onboard your Virtual Assistant.

- Capture processes with a video (we love Loom!), SOP's, live training, or a mix of both.
- Establish an onboarding process to ensure success, sharing your mission, vision & value statements.
- Co-create realistic expectations & goals with your VA to measure success.

PROCESSES TO CAPTURE

ONBOARDING IDEAS

STEPS TO MEASURE SUCCESS



Step

4

When you start the delegation process, be sure to always start working with your VA at Level 1, and work your way to time-freedom at Level 6!

- **Level I:** VA looks into the situation, get all the facts and reports back for instructions.
- **Level II:** VA identifies the problem, determines several solutions and the pros and cons of each, recommends one for approval, submits, and waits for instructions.
- **Level III:** VA examines the matter, sends word on what they intend to do, submits, takes no action until they get the go ahead.
- **Level IV:** VA decides on a strategy, sends word of what it is, and takes action unless they hear otherwise.
- **Level V:** VA takes action on the matter and reports back on what they did and how it turned out.
- **Level VI:** VA takes action - no further communication is necessary. The situation has been handled.



Step

5

Know what to expect! Below is a breakdown of what you can expect in your first 3 months of working with a virtual assistant.

In 30 Days:

- Building Trust
- Learn about one another and what communication style works best
- Understand and acclimate with the company culture
- Learn the company's product or service
- Weekly conversations to provide and receive feedback
- Learn any necessary tools/software
- Complete 1-2 assigned tasks/projects
- Strive to achieve a set goal
- WIN progress: are you getting there?

In 60 Days:

- Systems & Processes: what is currently working/anything new to create?
- Continue to complete the next set of assigned tasks/projects
- Added responsibilities
- Team integration
- WIN progress: how are we doing?

In 90 Days:

- Completely integrated with team/company
- Tasks/projects completed independently
- VA owns and manages multiple responsibilities
- Lines of communication are completely open
- WIN progress: let's count them together!



Congratulations!

IF YOU FOLLOW THESE FIVE STEPS,
YOU'LL BE ON THE *RIGHT* PATH TO ENSURING
SUCCESS WITH YOUR VIRTUAL ASSISTANT!