

6 Steps

To Help You
'Let Go' and
'Delegate'
to a Virtual
Assistant



About the Author



Rachel

Hi, I'm Rachel and, along with my team, I offer a number of virtual remote services that help businesses run more efficiently.

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Having a Virtual Assistant isn't the same as having an employee – we often save you money because we only charge for the work completed.

The biggest challenge for a business owner is deciding which areas are best to outsource and how to approach working with a virtual assistant, which is why I created this guide to help you understand and work out how to do this.

I hope you find this resource helpful.



Introduction

I know that it can be crazy running a Small Business. If you're anything like my typical clients you have created an amazing business out of nothing and you made the decisions that were necessary as you went along, without documenting much of it.

You want nothing more than to organise your efforts and grow.

BUT ... everyday life, the day to day administration of your business and its processes and ad hoc projects get in the way of growing your business. After all you didn't start your business because you love doing the admin!

By following the **6 steps** in this guide you will learn how to 'Let Go' and 'Delegate' to a Virtual Assistant.

You will be able to free yourself up to do everything you WANT, rather than what you HAVE to.

Step 1

Identify what you could handover



- The best tasks to outsource are those which will save you the most time and which are repeatable – tasks that you do daily, weekly or monthly.
- Brief a VA once and they will repeat on a schedule for you.
- Also – the jobs you put off doing and really hate doing – VAs love the ‘*administrivia*’ of running businesses because Admin is what they love.
- You may also want to outsource jobs that you don’t have great skills in.

Administrivia (noun)

The tiresome but essential details that must be taken care of and tasks that must be performed in running an organisation.

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Business Owners are brilliant at what they do, but doing the admin isn’t something they dream of when starting up!

Step 1

Identify what you could handover



To identify what you should 'Let Go' of you should think about:

A) How long do you spend on your admin each week?

I bet you will be surprised by how much you do!

B) Jot down EVERY task that you do over a couple of weeks, using the following headings:

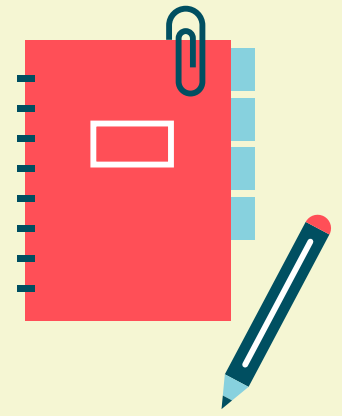
Is that a good use of your time or would your time be better spent on income generating tasks?

- Tasks that **NEED** to be done that you don't like doing and/or are not a good use of your time
- Tasks that you **LIKE** doing but don't need to be done by you
- Tasks you **HAVE** to do that are directly related to your clients and create income

Use your **NEED** and **LIKE** lists to identify those tasks that someone else could take off your hands - these will most likely be the tasks that you could outsource to a VA, leaving you to concentrate on the **HAVE's**.

Step 2

Document the tasks that could be outsourced



Once you have created your **NEED** and **LIKE** lists you can identify the sorts of tasks that you could delegate. You can then determine how much time you will need from a VA. The best way to do this is to time yourself doing the tasks.

- **Take notes** – Each time you are doing the task, open up a Word document or make sure you have a pen and paper to hand and start writing down all the steps you take to complete the task. Include any passwords, templates, screen grabs, etc that they may need.

- **Time yourself** – that's the maximum amount of time a VA should take to do the task (since you are documenting as well as doing).

The first task you outsource should be a relatively short and non-critical one, dealing with non-sensitive data. It should test whatever skills you need your VA to have.

Step 3

Do your Research



Now that you know what you want to 'Let Go' of you can start searching for a potential VA.

- Bear in mind that as you are only paying for the hours a VA works – you can have as many different VAs as you like – all with different skills. It won't cost you more money and you don't need to find all the specialist skills in just one person.
- To find a VA you should ask your network for suggestions on anyone they use or are aware of. Word of mouth is a great way of finding out about someone before you meet them.
- Look them up on LinkedIn, Facebook or their websites.
- Read through what they do to see if they are already doing some of the tasks that you are wanting to outsource.
- Many VAs do very similar things but they will all do them slightly differently and they all work in different ways. They may be part-time, others full-time and there are some who may do this alongside other roles as additional income. Some VAs can be very traditional in what they provide, whereas others offer a variety of support.

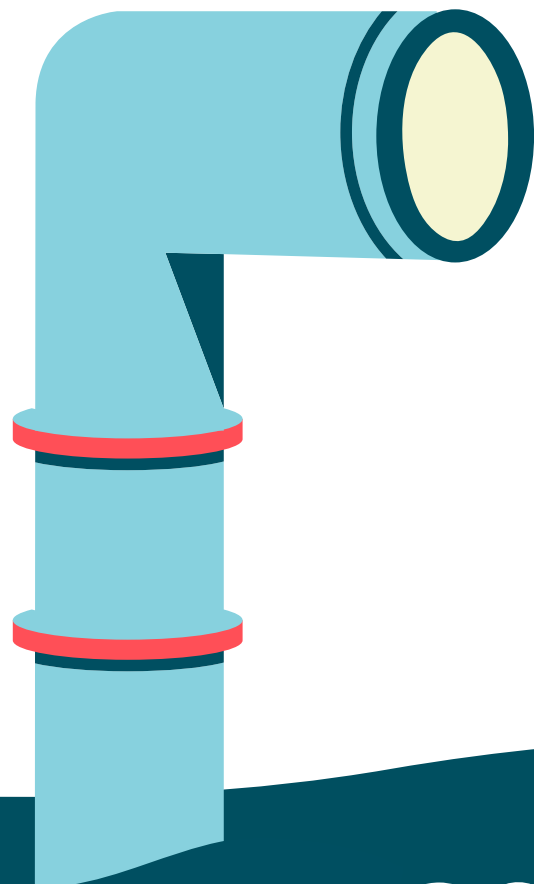
Step 3

Do your Research



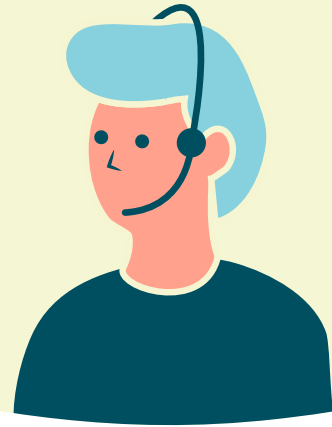
Other things to consider are:

- The majority of VAs will prefer to work from their home but there are some who may be happy to attend your site.
- Identify 2 or 3 VAs to speak to. You need to ensure that you are comfortable with them and that their personality works for you.
- You will need to be clear on what you want so that you can cover all this during your discovery calls.



Step 4

Discovery Call



Having a discovery call gives you the opportunity to find out more about the VA. During your call you might want to ask the following questions:

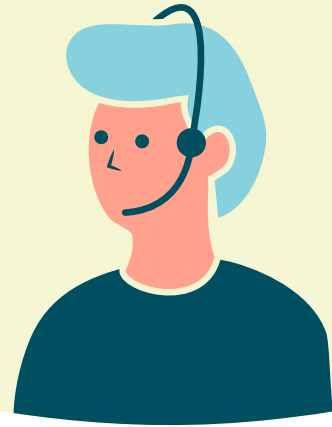
- **Security** – Ask about their security procedures. VAs need to be running professional standard antivirus software, have off site data back up in place and they should be aware of the data handling responsibilities and be registered with the ICO's Data Controller Register, especially if they are doing bookkeeping or other financial roles for you.
- **How long work will take** – Audio typing should generally take between 3-6 times the amount of audio you provide, depending on clarity of the recording.
- **Rates** – Some tasks are tricky to estimate but the VA should be willing to estimate based on a sample of the work or by doing a short amount of the task (say an hour) and letting you know how much they have completed. You should be prepared to pay them for this time.

*Rates in the UK for Virtual Assistants generally range from
£15-£35 per hour.*

*You should ask what is included
(Phonecalls? Postage? Any systems/software?).*

Step 4

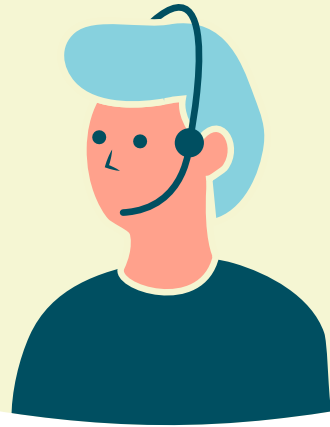
Discovery Call



- **Turnaround Times** – Ask how fast they would be able to complete your work. Some VAs will only work part-time, some will have a specific time of the week set aside to complete your tasks, some may have a cut off time for work submitted if you want it back the next working day.
- **Insurance** – A VA should have suitable professional indemnity insurance. The VA will be advising you about your admin in a professional capacity and will often have access to sensitive material. Make sure you are protected – ask to see their policy.
- **Team Working** – Ask if the VA is a solopreneur or if they work as part of a team? Both models have pros and cons. Solo VA ensures the same person does your work, but may have issues if they are sick, on holiday or simply busy with other clients. Team environments usually have better capacity but continuity is sometimes an issue and they may/may not have quality control in place – ask about this.
- **Contract** – Ask if the VA has a contract they prefer to use. A professional VA will have one and they should be willing to send you a draft copy of this so that you can determine if it protects yourself as well as the VA.

Step 4

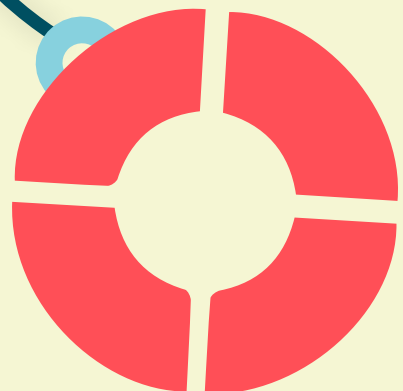
Discovery Call



You should also think about the following because your potential VA will probably ask you some or all of the following:

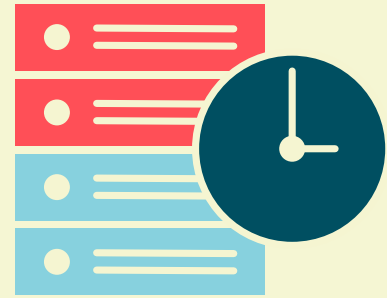
- They will want to know about your business
- What your plans are going forward if you were to bring in a VA
- How you would envisage working with a VA
- What your biggest issues are right now
- What your ideal solution would be to those issues

A discovery call is both yours and a VAs opportunity to find out more about each other.



Step 5

Delegating to your Virtual Assistant



Once you have identified who you want to work with and are ready to start delegating to them, you will need to set a day and time when you can concentrate on handing over the tasks. The more time you can spend with your VA upfront will enable them to take on the tasks immediately and not have to come back for further clarification.

Using the documentation that you have produced, go through each task in detail with the VA. They will want to know:

- Why the task is required
- What is its purpose and does it impact anything or anyone else (ie your clients)

- How 'to do' the task (use the steps you documented) but be prepared that they may suggest another way of doing them
- What access or information they require to take this on from you (logins, links etc)
- When and how often you need it done (daily, weekly, monthly etc)
- Anything else they need to be aware of

As mentioned in Step 2, you may want to consider starting with one or two tasks initially and build up what you give them over time, as you become more confident in their abilities.

Step 6

Develop your relationship with your VA



Over time you should settle into a great working relationship with your VA, being able to hand other tasks over to them to free you up even more.

- Remember that they are part of your team regardless of the number of hours they do for you. Keep them informed of any changes to your business or your future strategies so that they can continue to support you.
- Make sure you return their calls when they make contact, as this may delay the work being done for you.
- Don't micromanage them – they are professionals and they may have other clients. By all means

set a deadline with some leeway and expect your VA to check in regularly on longer term projects, but their business relies on working uninterrupted for you, so extend that courtesy to everyone else your VA works for.

- Make sure you pay them on time. Typical payment terms are upfront for new clients or big projects and 7-day payment terms for most other clients. If you purchase retained hours then this will be prepaid. Tell them immediately if there is a problem with payment straight away.
- Say thank you for a job well done - it's always great to know that what we do makes a difference!

Thank You

**Thank you for Downloading my
Free Resource!**

I hope you found it useful in identifying how to 'Let Go' and 'Delegate' to a Virtual Assistant.

If you are interested in finding out more about working with a Virtual Assistant feel free to make contact to schedule a FREE exploratory call.

I would love to learn about your business and help you to decide if a Virtual Assistant could work for you.



Get in touch

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