Virtual Assistants Are Angels

Expedite Your Growth and Save Your Precious Time
by Contracting a
Virtual Assistant

YOUR TRUE
POTENTIAL

IGNITE YOUR POWER WITHIN

Action Guide

Table of Contents

How to Use Your Action Guide

You'll get the best results from any course you participate in by completing the Action Steps at the end of each module. They will help you apply what you learn directly to your business and your life, maximizing the investment you're making.

Use the following Action Guide to record your answers, insights, and other notes for the Action Steps, which are outlined in your Course Book. You'll want to refer to each module's content as you complete the related steps.

While we have left space in the guide for each action step, you may feel more comfortable using a separate notebook or digital application for your work. Use whatever method you feel most comfortable with and don't feel constrained to using the space in the Action Guide alone.

In addition, your course may have other Action Sheets, such as spreadsheets or planning templates, which are separate from the guide. Look out for those with your other course materials.

Finally, you don't have to complete all the steps at once. Instead, try setting a specific time on your calendar to work on them. And don't feel that you have to get it right the first time. Learning is a process that happens as you apply your new skills and knowledge. You'll want to return periodically to your Action Guide and both remind yourself of the work you've achieved and edit your answers as you see their impact.

Have fun with it and enjoy the progress and successes that will happen as a result of your work!

Introduction

Expectations

Before we start the course, take a minute to think about what you want to get out of it.

Write down three skills you expect to gain.

1	
2	
3	

Module 1 – Get Ready for Your Virtual Assistant

1. **Quick Win:** Brainstorm everything that stops you getting a VA.

2. Reframe your mindset by answering the questions below:

What am I trying to achieve?	
What outcome do I want?	
What resources might I need to get there?	
Is this decision to hire a VA getting me closer to my outcome? **Or is it pulling me away?**	
If it isn't then what's a better decision I could make? **Why is this better?**	
How will I know when I have achieved my desired outcome? What will I see, hear, feel, or experience?	

3. Calculate your hourly rate and compare that to VA rates:

1.What revenue can you bring in annually (if you have help)? Add on 30% for expenses, taxes etc.	
2.Hours you want to work each week x number of weeks you want to work in a year minus 25% non-billable hours (marketing etc.)	
3.Divide your answer to #1 by the answer in #2	
4. How does your hourly rate compare to VA hourly rates?	

Module 2 – Identify Your VA's Tasks

1. **Quick Win:** List the tasks you want to outsource..

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Group your tasks by category:

Groups	Tasks
Admin	
Tech	
Graphic Design	
Blog Writing	
Scheduling	
Social Media	
Other	

2. Go through your list of admin tasks and work out how long each task would take a new person:

Task	Time Needed

3. Plan out the hiring timeframe, taking into account future business growth:

Stage	Time Frame
Advertising	
Selection	
Onboarding	
Training	

Module 3 – Find the Right VA Match for You

1. **Quick Win:** Decide on your essential parameters for a VA.

2. List the specific experience, qualifications, and qualities you need:

Experience	
Qualifications	
Qualities	

3. Write a job spec using the template provided in the course book, but leave the company information blank for now:

Job Title	
Location	
Hours per Week/Month	
Hourly Rate	
Company Details	
Company Values	
Job Overview	

Responsibilities and Duties	
Experience	
Qualifications	
Personal Qualities	

Module 4 – Use Your Job Spec To Shortlist

1. **Quick Win:** Make a rough assessment of the maximum number of people you have time to a) shortlist and b) interview.

2. Which test(s) do you want to use as part of your assessment process?

How they will help you shortlist?

Tests	Details of Test	How will this help your shortlist?
Skills Test	*E.g. if the job involves writing, ask them to write something. Or if you want them for a tech project, get them to set something up for you.*	*This will demonstrate their skills.*
Test within the Application	*E.g. Ask them to reply with the word 'coconut' in the title.*	*This will show you if they're serious and have actually read your ad right through*
Paid Task/ Trial Period	*E.g. Ask them to undertake a paid trial project or take them on for one or two hours of paid work.*	*It will help you judge if they are a good fit for your business*
Other		

3. Describe your company and its values and enter this information into your job spec template (in the previous module).

Module 5 – Find Your VA in the Right Places

1. **Quick Win:** Ask around to see if anyone you know can recommend a VA. Record your findings below.

2. Research sources of VAs and list the pros and cons for your business:

Sources of VA's	Pros for your Business	Cons for Your Business
1. **Recommendations**		
2. **Individuals**		
3. **VA Agencies**		
4. **Freelance Sites**		

3. Choose the source(s) you want to use:

1. Recommendations	

2. Individuals	
3. VA Agencies	
4. Freelance Sites	

Use the ad example in the module to guide you as you write yours below. When you are happy with the wording, place your ad with your chosen source(s) according to the procedures.

Ad Placed with	Date

Module 6 – Choose Your First VA

1. **Quick Win:** Check what you need to include in your contract for your country and add this below.

2. Put in place any test or trial period and assess the results:

Candidate	Test results

3. Write your interview questions and set up interviews (you can reprint this sheet for each candidate):

Candidate Name	
Date & Time of Interview	
Questions:	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Module 7 – Set Up Stellar Systems and Standards

1. **Quick Win:** Re-evaluate your current productivity tools. Will they work when you're collaborating with someone else? What else do you need to introduce?

Productivity Tools	Uses

2. Design the step-by-step processes for the key tasks to handover to

your VA. Use this sheet just as a starting point. Use separate spreadsheets or documents to do a more detailed checklist for each task.

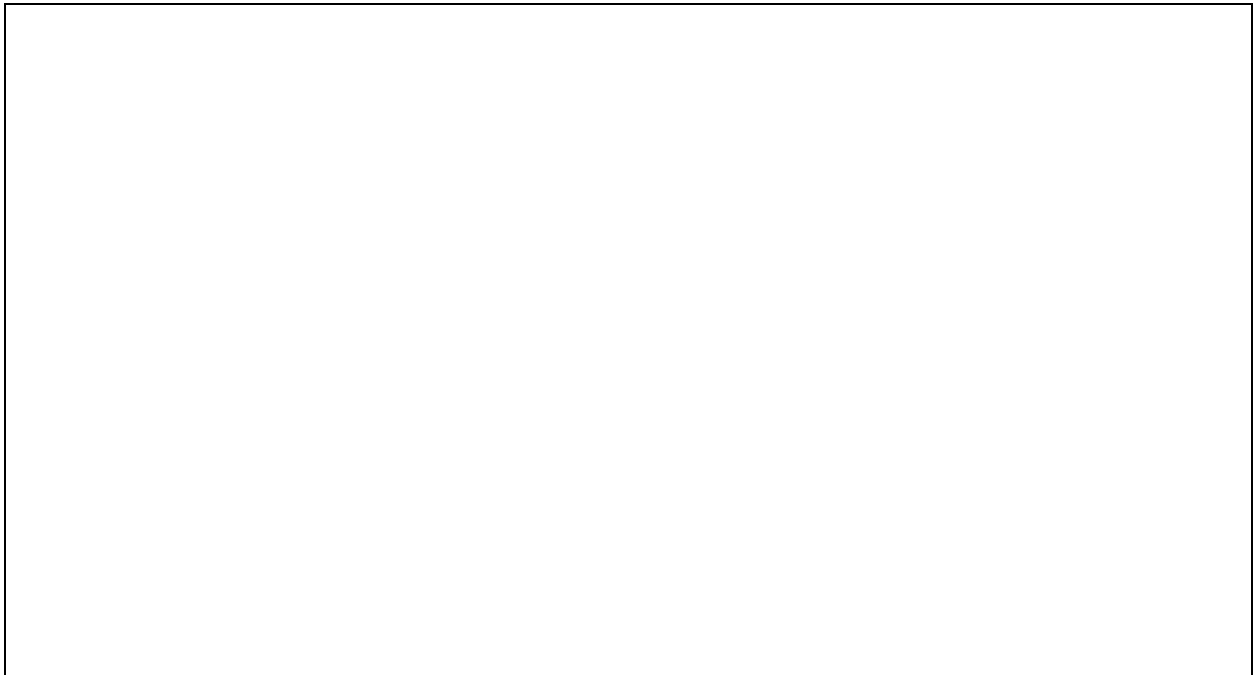| Task name	What steps do you go through now to achieve this task?	Are these steps in a logical order? If not, change it	How will you present this as a training tool to your VA?
	1 *2* *3*		*e.g. checklist, flowchart*

3. Review these processes before you share them with your VA by

answering these questions:

Can my VA achieve this with their current level of skill?	
Can they achieve what I want in the hours I've employed them for?	
What extra support will they need initially to complete tasks to the standard I've set?	

Module 8 – Onboard Your VA for a Smooth Start

1. **Quick Win:** How will you share your company information and values?

2. List your VA's training needs and develop a training plan using the

template below. Duplicate this worksheet as needed for each area of responsibility.

Area of Responsibility:

1. **Training Goals**	
2. **Learning Objectives**	
3. **Learning Methods/Activities**	
4. **Evidence of Learning/Evaluation**	
5. **Planned Delivery Date**	

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3. Develop an onboarding plan for your VA:

Does your VA have access to everything they need?	
Have you introduced them to everyone in the team?	
Have you set up the initial group call?	
Do they have the contact details of those they need?	
Have you checked that they have everything they need?	
Other -	

Module 9 – Delegate for Success

1. **Quick Win:** Write down your experience of delegating to date, both being delegated to and doing the delegating. What worked? What didn't?

2. Go back to the list of tasks you compiled in Module 2. Prioritize these

in the light of current business needs and the strengths of your VA.

#	Tasks in Order of Priority
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

3. Plan how you will delegate your top priority task using the step-by-step process below:

1. Give an overview of the task	
2. Describe how it fits in or adds value to other tasks	
3. Explain expected outcomes	
4. Clarify guidelines for success	
5. Provide step-by-step instructions	
6. Agree how/when to communicate while doing the task	

Module 10 – Manage Your VA for Maximum Results

1. **Quick Win:** Brainstorm the particular challenges you think you will experience when managing remotely and identify how you will overcome these.

Challenges	Solutions

2. Plan out the four stages of the performance management system and

what you will do at each stage:

Plan	
Act	
Monitor	
Review	

3. Set up your communication plan:

Communication Schedule	
Communication Tool(s)	
Task Assignment Tool(s)	

Module 11 – Develop Your VA for Future Growth

1. **Quick Win:** Plan the rewards you could give in your business for a job well done.

Bonuses	
Gifts	
Pay raise	
Team offsite or working 'vacation'	
Professional development	
Other	

2. Identify the development opportunities for your VA's future:
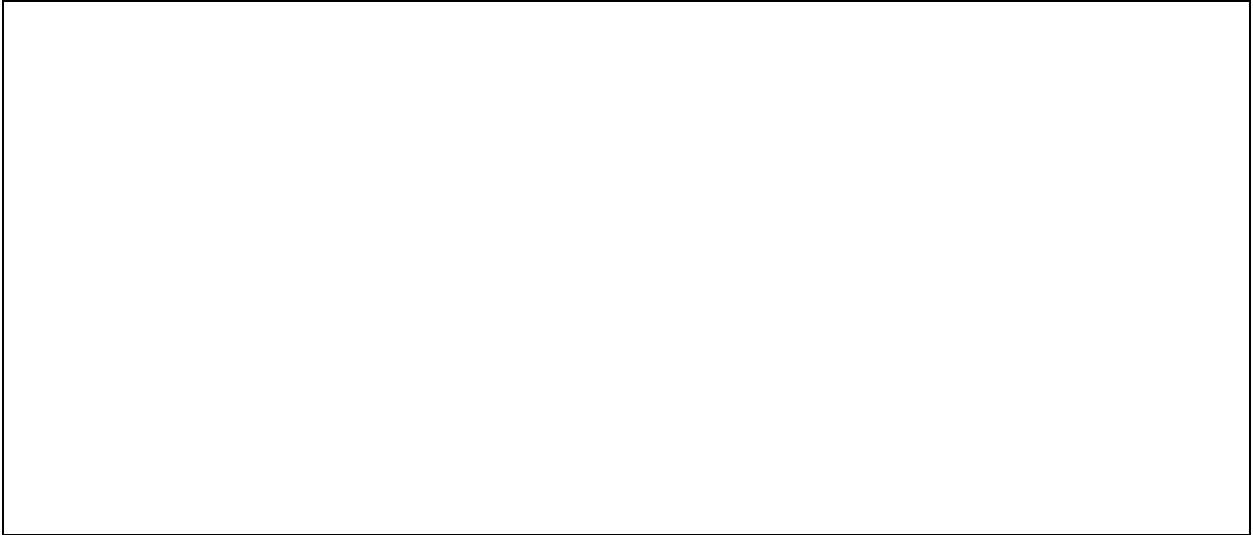
What are your VA's strengths?	
Are they being used to the full?	
What additional tasks are they interested in for the future?	
What training if any would be needed for these?	

3. Plan to use the time you free up to advance your business. Answer these questions:

What will you do with the time you gain?	
How will this specifically advance your business?	

Module 12 - Review and Refine

1. **Quick Win:** What else do you need help with? How could you go about building a team?

2. Answer the course review questions below and use the action plan
   table to record your goals and what needs to happen next:

What have you learned about hiring and delegating to remote workers?	
What difficulties have you encountered?	
How do you plan to address these?	
What further steps can you take to become totally comfortable with the process?	

Your Action Plan:

	Action to Take	Action Deadline
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		