Employee Training Manual

VirtualAssistUSA

www.VirtualAssistUSA.com

Contents

Welcome to Virtual Assist USA!

I am so excited to welcome you and look forward to all your success as part of the team. I opened the virtual doors of Virtual Assist USA in 2008 from a tiny apartment dining room table with a hope of serving clients by growing relationships and nurturing partnerships. Over the years, we've grown exponentially are consistently the top ranked and reviewed Virtual Assistant company in the country. **You are now an important part of that.**

We bring those on board who are obsessed over making the customer experience perfect, who love the challenge of converting clients into raving fans, who love creating and using procedures, who are excited to get their hands dirty and who are enthusiastic. We're so glad that's you.

This handbook is designed to acquaint you with Virtual Assist USA, provide you with information about policies and the overall operations of Virtual Assist USA and ultimately talk about our number one goal: stellar extraordinary service.

You should read, understand, and comply with all provisions of this manual as an employee the contents of this manual are strictly confidential and may not be shared with anyone outside of Virtual Assist USA.

Warmly,

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About Us

Virtual Assist USA, an all-American team of Virtual Assistants, provides all the benefits of an in-house staff and support team, without the costs on that an employee requires. Our clients receive immediate access to our 100s of services including: Administrative, Marketing, Web and Graphic Design, Social Media, Public Relations, Search Engine Optimization and more. Our complete Services list can be found here: http://www.virtualassistusa.com/virtual-assistant-service

10 years ago, assistants were a luxury available only to senior executives. Today's technological advances allow every entrepreneur, business owner and manager to hire their own, personal virtual assistant. Our elite, skilled, right-hand business support at Virtual Assist USA enable our clients to accomplish a wide variety of tasks that would typically require an entire staff of employees, office space, expensive equipment, training periods, and substantial time and money invested. No other service offers this level of expert, convenient and affordable support.

Now that you know about the ordinary VA, we can tell you how Virtual Assist USA takes the ordinary and turns it into the extraordinary. Virtual Assist USA offers unique benefits such as: personal service, fast turnaround, quick ramp-up and precision billing. A Virtual Assistant USA team member will take on the tasks that lock you down, while freeing up your time to do what you love. Our bottom line: We take care of your business as if it were ours.

We've received lots of praise from clients over the years. Follow this link to see just a sampling! http://www.virtualassistusa.com/virtual-assistant-reviews

Virtual Assist USA is an award-winning company including: *Chase Bank Smart Business Award – Innovation, Athena Young Professionals Award, Stiletto Women in Business Award, Web of Trust Award, Pittsburgh's 50 Finest, Ernst & Young Entrepreneur of the Year Award Finalist and Business Journals Women of Distinction.*

Social Media Policy

Please follow, like and share our social networks:

- Facebook: https://www.facebook.com/findvirtualassistant
- LinkedIn: http://www.linkedin.com/company/virtual-assist-usa

Additionally, if you ever have something that you'd like to post, please let us know at hello@virtualassistusa.com. We love to receive input from the team.

We also request that you do NOT add clients to your personal Facebook page.

Daily Timeline

1. Start the timer in Teamwork as soon as you begin your day/task and email/teamchat either Danielle/Nicole or both that you are logging in for the day.
2. Check Teamwork PM for LATE tasks first, then today's tasks. Check your daily calendar. What do you need to accomplish today?

3. Begin working on whatever tasks or projects that you have allotted time for today. Client tasks always take precedence over internal tasks. Make sure your timer is on the correct project/task that you are working on.
4. If you can see you may have difficulty completing your tasks for the day due to overload, no fear! You have a couple of options:
   i. There is usually someone on the team that can step in and make sure you retain that ROCKSTAR status with your clients!
   ii. If completion of a task must be delayed, contact your client IMMEDIATELY and let them know. Give them a realistic time frame for completion, then change the due date on the task in TPM.
5. Clear all activities daily – let Danielle/Nicole or both know when you are leaving for the day. Make sure to double check your time in teamwork for the day for accuracy, descriptions and details.

Expectations

It is absolutely required that we can count on you 100% and that you are punctual in meeting deadlines and attending meetings. Clients depend on us to be there for them and meet deadlines, and should we not be able to do so because you do not show up on time (or not at all), it would create serious problems for us and lead to the termination of your contract.

Communications: We value your presence as a member of our team, and as such, want to ensure that communication is open, honest and frequent. Any issues with clients must be communicated to us via phone, email or text as soon as possible

Starting with a new client

1) When a new client is assigned to you, you will be emailed the client's initial inquiry form and Client Onboarding Questionnaire, as well as any pertinent information.
2) You will have access to their account in Teamwork Project Management.
3) You will then need to email the client IMMEDIATELY and schedule a Client Orientation Meeting with that client to occur within 24 business hours, at the client's convenience. It's important at this step that we show our flexibility and reliability to the client in scheduling.
   a. The goal of the conversation is to get to know the client, obtain an understanding of their goals, and ensure that initial tasks are scheduled. You can refer to the client orientation document for instructions of the call.

TeamWork

"Whatever you do, do it so well and so uniquely that people can't help but talk about you."

-Walt Disney

All client projects will be distributed via Teamwork Project Management, which you have received a secure login to.

If you are new to Teamwork Project Management:

- Below is a list of capabilities of Teamwork:
  - Dashboard
  - Projects
  - Tasks & Task Lists
  - Milestones
  - Messages & Comments
  - Notebook
  - Files
  - Time log
  - Links
  - People, Companies & Permissions
  - Hints & Tips
  - Everything section
  - Notification Tollbar

As you are assigned tasks in Teamwork Project Management, the system will automatically send you an email with:

- The client info
- The task details
- The deadline

Note: Not all clients will assign you tasks in teamwork. This is something you can discuss with the client and give them as an option. Otherwise you will have to enter the tasks in to teamwork and set the appropriate deadlines, etc. You will receive a training on how to utilize this platform further in a brief training with our VP of Operations.

Client Retention & Being Proactive

Marketing to and converting prospects into paying clients for Virtual Assist USA takes time, money and resources. Client retention is everyone's job - doing a satisfactory job for clients and making them feel good about working with Virtual Assist USA. When we can retain an existing client, it's more cost-effective than finding a new prospect and starting the onboarding process all over again.

1) Immediate Follow Up: As soon as a larger project (rather than task) is finished, give the client a call or set up a meeting. Pose questions like "How is the project working out for you? Did I meet your expectations?" Reiterate that you're excited to work with them again. Be proactive in explaining any similar tasks or projects that may complement what was just completed.

2) Make Recommendations: Once you work with a client and get a better feel for his or her needs, watch for other opportunities to be of service. For instance, if you're writing copy for a landing page, you can tell the client about our web designer's ability to design compelling landing pages. Explain how these two items together will make the project more successful.

How do I help a potential client know what to delegate?

There are several techniques for doing this:

#1: Ask the client to write down every task they do over the next few days. Then to mark in red everything only they can do. Then to mark in orange things that they'll keep doing for now but might pass over to you later. Everything else on the list can usually be outsourced to you.

#2: Ask them to write down every task they do that takes them longer than half an hour.

Then they highlight things they don't like doing or don't really need to do themselves. Then to write down the things they want to do but don't have time for – their wish list. These are things such as business development, trying new marketing avenues, giving their existing clients more value or service, spending more time with their family, writing content, developing a new product or service etc.

You can then either do their wish list for them or take on the other tasks, so they can tackle their wish list themselves.

#3: Ask them some probing questions such as: What tasks are on your "other" to-do list, the long-term list of things that you never get around to because work keeps getting in your way? How many emails are in your inbox? What one thing would you do straight away - if only you had more time? How do you get your clients? Do you have enough clients? Do you have enough time to give our existing clients the best service or after-care that you want to? Do you do follow-ups with your clients to get testimonials or case studies from them? Do you connect with them on social media? Do you do feedback sessions with your clients or have other relationship-strengthening processes in place? Where do you see your business in 1, 2, 3 years' time -- and are you on track?

#4: A client's work can be categorized into $10 tasks, $100 tasks and $1,000 tasks. Business owners who want to go to the next level need to outsource their $10 tasks, so they can focus solely on the bigger ones. $1,000 tasks are business-progression things like connecting with business partners, strategy, and creating courses. $100 tasks are (for some) things like marketing and creating content. And $10 tasks are everything else. $10 tasks still need to be done – but not by a client. They should be focusing on the $1,000 tasks and some of the $100 ones. They are wasting time, energy and money by doing their own $10 tasks.

The bottom line: Clients need to think about what their core role is- what do they offer? What do they love to do? What is their value to their clients? Why did they go into business for the first place? The purpose of you, as the Virtual Assistant, is to enable them to do that.

Clients work with Virtual Assist USA because they want to make or save money, save time or save their sanity.

The above tips work well for clients who are disorganized and want a VA to sort their life out for them. They'll find value in you immediately if you're able to give them some direction and order.

Remember, after you give them their exercises, you have to follow-up with them. So, pre-agree a mutually convenient time to contact them, schedule it in your calendar and do it.

What to do when you have a difficult or challenging client?

Here are some tips as a list so that you can mix and match what applies to your specific situation.

1) We implore a New Client Orientation Packet to new clients so that they have a clear understanding of our professional boundaries. This establishes us as a professional - much like their lawyer or accountant. No client should ever be unsure of these terms and it's helpful to refer to them.

2) Clarify each task by repeating it back to the client in an email then save the email so you can refer to it later.

3) Don’t be embarrassed to ask questions and clarify the situation.

4) Sometimes a client will call or email you out of business hours. They are not expecting you to reply straight away -- they may just be taking something off their plate -- so you do not need to respond right away or adhere to our normal response time standards.

5) Create a shared Google Sheet for all the tasks the client has asked you to do then ask them to order them by priority. You can then enter the status of each task, so the client can see what’s happening. This works when a client wants constant progress updates, or they are finding it hard to priorities. This also means you have given the client responsibility of prioritizing the tasks. You could even email them each week to remind them to update the sheet.

6) Write clear and structured emails to the client stating who is responsible for what and when ("I’m doing this and you’re doing this").

7) Keep your weekly check-in calls with clients -- these can be as short as 15 minutes. These calls can be used to evaluate the progress of projects or tasks.

8) Research. If a client presents you with a task that you are unsure about – conduct research, take 10-15minutes. See how extensive this task will be. Gather as much information as possible and then ask for help if need be!

Lifetime Value of a Client

Most of us are transaction oriented and only consider the value of a client during that single transaction. At Virtual Assist USA we are relationship oriented and we understand the lifetime value of a client. Even with those clients who may come to us for one-time projects. Lifetime value is what a client is worth to Virtual Assist USA over the course of our relationship with that client, and we base all our decisions on this philosophy. This represents a small but powerful shift in thinking. All client interactions will be approached with the repeat/referral mindset. The lifetime value of a client is ten to twenty times the value of the initial transaction. Therefore, we approach every client interaction with this in mind. How we interact with our client determines the lifetime value. If we neglect them, don’t return a phone call, don’t keep them updated, etc., we may still get the initial sale, but destroy lifetime value in the process. Therefore, ALL client interactions will be approached with the repeat/referral mindset.

Begin with The End in Mind: The actions we take today affect the results we get tomorrow. Therefore, every action is done with the end goal in mind. We begin by building foundations that will enable us to achieve our end goal. Here are some examples:

• Client interaction: begin the relationship with the repeat/referral end in mind.

• Personal goals: begin with specific actions today that will enable you to reach your end goal.

Progress, Not Perfection: We will never be perfect, so "fuhgeddaboudit!" However, we can constantly improve. Small daily and weekly improvements will add up over time, making Virtual Assist USA of much better service to our clients.

You Are the Pilot: Building a relationship with a client is like taking an airline flight across the country. The client has a goal to reach their destination (i.e. project completion, such as a new website, or increased efficiency in their business with our administrative help) and it's our job to get them there. As the pilot, you are responsible for all aspects of the flight—even things that are not your job. For example, it may not your job to provide copy for a new landing page; that's the copywriter's job. Your job is to make sure that you submit a complete and thorough task description to the copywriter so that they can quickly understand what we are asking from them. ("Garbage in, garbage out" theory.) If the copy (or any other product) is late, we can't go to our client and say, " It's the copywriter's fault because they lost your order and didn't complete it!" The client doesn't care what the copywriter did or didn't do. They will hold us responsible—and rightly so! Just like real airline pilots we can't promise our clients we will never hit turbulence, but as the pilot of their plane we do promise them that if we hit turbulence we won't bail out on them. We will use our professional skills to pilot them safely through the turbulence and on to their destination.

How to handle breakdowns with a client?

Some of the greatest opportunities for providing that 'wow' experience for clients occur when breakdowns happen. If a mistake is made, immediate attention must be given, and immediate communication of the mistake must happen. There are a few steps involved in salvaging a terrible experience and they are simple:

- Share a genuine and compassionate reaction to the client's distress
- Offer appropriate apologies (no need to overdo it here).
- Assure the client that you will take care of the issue.
- Individually and through the resources of our team, see that the problem is taken care of in a way that meets the satisfaction of the customer and does not recur.
- Go one step further to demonstrate that you want to try to compensate for the person's loss or frustration. Reach out to Danielle to let her know so that compensation can be made to the client in the form of comped hours/gift.

We do not penalize our employees for making mistakes.

Our 3 Steps for Excellent Client Service

Timeliness, accuracy and responsiveness are important, but they don't create a memorable service experience because those attributes are simply expected. How can we create this experience for clients?

Listening

Sadly, you are not a mind-reader, nor do you have all the answers. The only way to find out exactly what your clients' needs is to ask them and, most importantly, to listen to what they tell you. It's easy to assume that what's worked in the past will work for every client, but you can never be certain. Listening to what your client has to say and adjusting to meet their needs will set you up for success.

Being proactive

Being proactive is both anticipating the client's requests before they ask, but, more importantly, sharing ideas to the client -- of how they can do something better, faster, more affordably. Other ideas to be proactive include sharing an industry-related article, updating them on a new plug-in or tool, etc.

Caring

It's important that when you work with a client they can tell that you genuinely care about them and the success of their business.

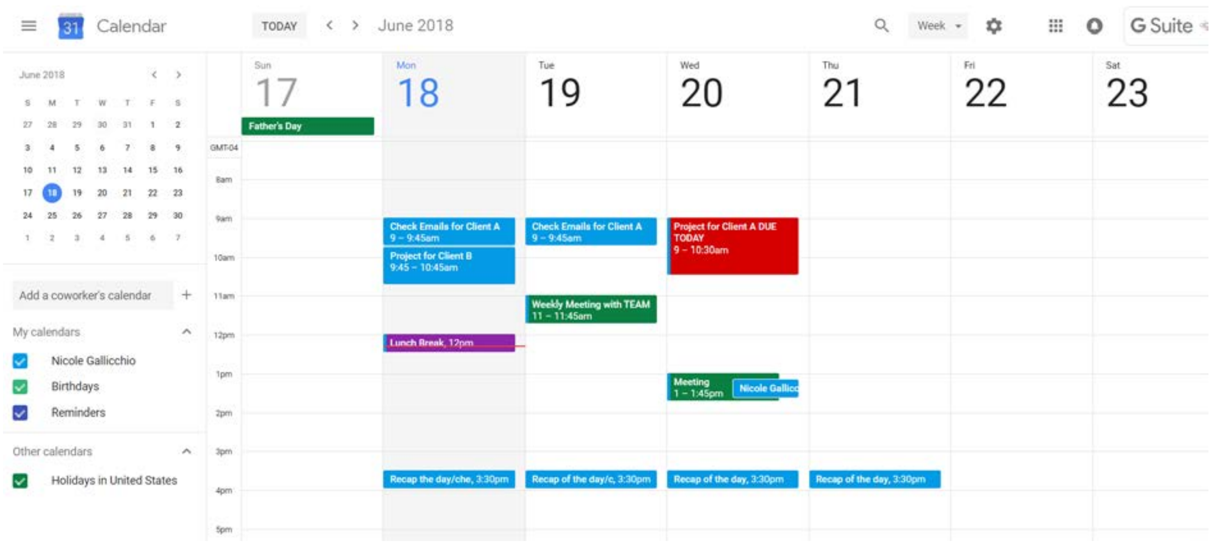
Time Management with Multiple Clients

Schedule meetings later in the day: If you book meetings toward the end of your day, they don't encroach on your working hours as much. Schedule blocks of work in your calendar: Always allow buffer space either side and for unexpected tasks to drop in, lunch, stretch breaks, etc.

Break up big chunks of work: If you need to spend 5 hours on a task but can't see where you can find 5 hours in a row, then just do one hour a day for 5 days. This seems obvious but it's really easy to forget! If you've ascertained what the deadline is for a task (you must ALWAYS do this!) then you'll know how long you have to space it out. Take advantage of flex time: Our flex time policy is designed to help you take advantage of what time you work best. Make your work fit around when you're at your personal best.

*Take regular breaks: Stop for coffee, go for a walk in the park, etc. Breaks are essential for your work/life balance!

Utilizing a calendar with time blocks is an effective way to time manage. It lays everything out for you visually. The google calendar attached to your virtual assistant email is a fantastic way to begin this. Color code your calendar, set recurring tasks daily, weekly etc. See an example below:



This will allow you to organize your day. Easily manipulate time blocks, drag and drop to the next day if necessary. Red flag any due dates etc.

How to handle a client who calls outside of business hours, calls without scheduled meetings, etc.

While a work/life balance is important, it is still important to be flexible with clients. Simply telling them that you're only available at x time or only available by email is rigid and not realistic for the way that most of our client's work. We do need to be fairly flexible with our clients to deliver great service but can and should set some boundaries in this area.

Here are some scripts that you can adapt to work with a client like this:

"I want to talk about the best way for you to reach me when you need me. Because I have multiple clients, I'm not typically available for ad hoc phone calls throughout the day — but I'm glad to make time for them when we can schedule them in advance. You know, the advantage of hiring a Virtual Assistant like me to do this work is that you get expertise in ___ without paying the full-time salary and benefits that you'd pay to have someone on staff who does it. But the flip side of that is that I'm not available all the time the way your own full-time employee might be. I'm splitting my time between several projects and can't offer full-time availability to you. But I'd be glad to schedule a weekly or twice-a-week standing phone call with you, and we could hash through all these things on those calls. Would that work?"

That said, it's still smart to be willing to go outside of your boundaries at least some of the time - meaning answering a last-minute call once or twice a week, not once or twice a day. When we as VAs are somewhat flexible, we are more valuable.

What about Mistakes?

Providing the freedom to fail is an important trait of the company— we couldn't expect so much of our team members if we penalized heavily for errors. Even expensive mistakes or ones that result in a very unhappy client, are genuinely looked at as opportunities to learn. We believe we can always repair the mistake or make up for it.

There are still some bad ways to fail. Repeating the same mistake over and over is one. Not listening to clients or other team members before or after a failure is another.