

# A Guide to Professional Resources

Business & Marketing Guide in a Virtual Space



## RESOURCES

A guide to a crucial part of a business, finding the best resources available to conduct the business activities in the best way possible.

## SAVE TIME AND MONEY

Identify what you want your VA to be able to do the first 7 days you work together, the first 30 days, 60 days and 90 days.

## VIRTUAL ASSISTANT

Hiring Virtual Assist USA comes with no sunken costs. There are no upfront fees, added rates or costs





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Top resources to use to grow your business and ease your day to day.

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Our top recommended resources and systems.

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How streamlining your systems can impact your business.

# OUR SPECIALIST'S NOTE

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While businesses come in all different shapes and sizes, there are essential systems and resources that every business must have to be successful. In a nutshell, systems are the way that things are done in your business.

These core resources and systems provide a framework for how your business is operated. While your business might've started out without systems, things start to unravel as it grows and brings on more team members, it becomes chaotic.

If your systems are in your head, you don't really have systems until they are written down and can be executed by someone else. Once documented into procedures, these systems become easier to manage, improve and monitor. Your systems ensure that you are not wasting time every time you need to take action and that you get a consistent result

I hope this guide provides insight into which resources to begin with and how you can help streamline your business to focus on the parts of your company you love.



**BROOKE WALL**

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Virtual Assist USA



# WHICH PROFESSIONAL RESOURCES AND SYSTEMS SHOULD YOU USE?

Systems and processes have a significant role in building a company.

The two most important factors of implementing systems and processes in your business are efficiency and accuracy.

By incorporating them into your workday routine, these will help improve your overall efficiency. To make your life that much easier... using a Virtual Assistant can manage it all for you!

These are our top recommendations to get started for your business today!

1. Platforms
2. Outsourcing
3. Automation & Sales





## Tip No. 1 Platforms

- ✓ Utilize a CRM or PM systems to organize large volumes of data, better manage relationships with your customers, create streamlined sales and marketing campaigns, communicate with your team, automate your system, and so much more.

# CUSTOMER RELATIONSHIP & PROJECT MANAGEMENT

With hundreds of platforms out there, determining the best CRM & PM software for your business can feel overwhelming – even more so if your business is small or new. Sometimes it feels like you don't even know where to begin. Luckily, we have vetted several, and we mean several, platforms and have narrowed down the top ones we recommend for various business needs.

1. **Asana** combines elements of project management, file storage, and collaboration and helps to manage projects across a team without email.

Top features:

- (a) Tasks and team assignment
- (b) Projects roadmaps and timelines
- (c) Milestones and team progress
- (d) Project dashboards to get a quick overview

**What's special about this tool:** Asana is a really easy-to-use tool with a simplistic layout ideal for small teams with simple projects.

2. **HubSpot** is an ideal CRM solution for small businesses just starting out. While there are several paid plans, you can also get started free of charge with a lightweight yet powerful version of the CRM software.

Top features:

- (a) Email Marketing
- (b) Managing Workflows
- (c) Automations
- (d) Track Leads & Sales Process

**What's special about this tool:** HubSpot also allows you to find out if clients ever opened your emails.

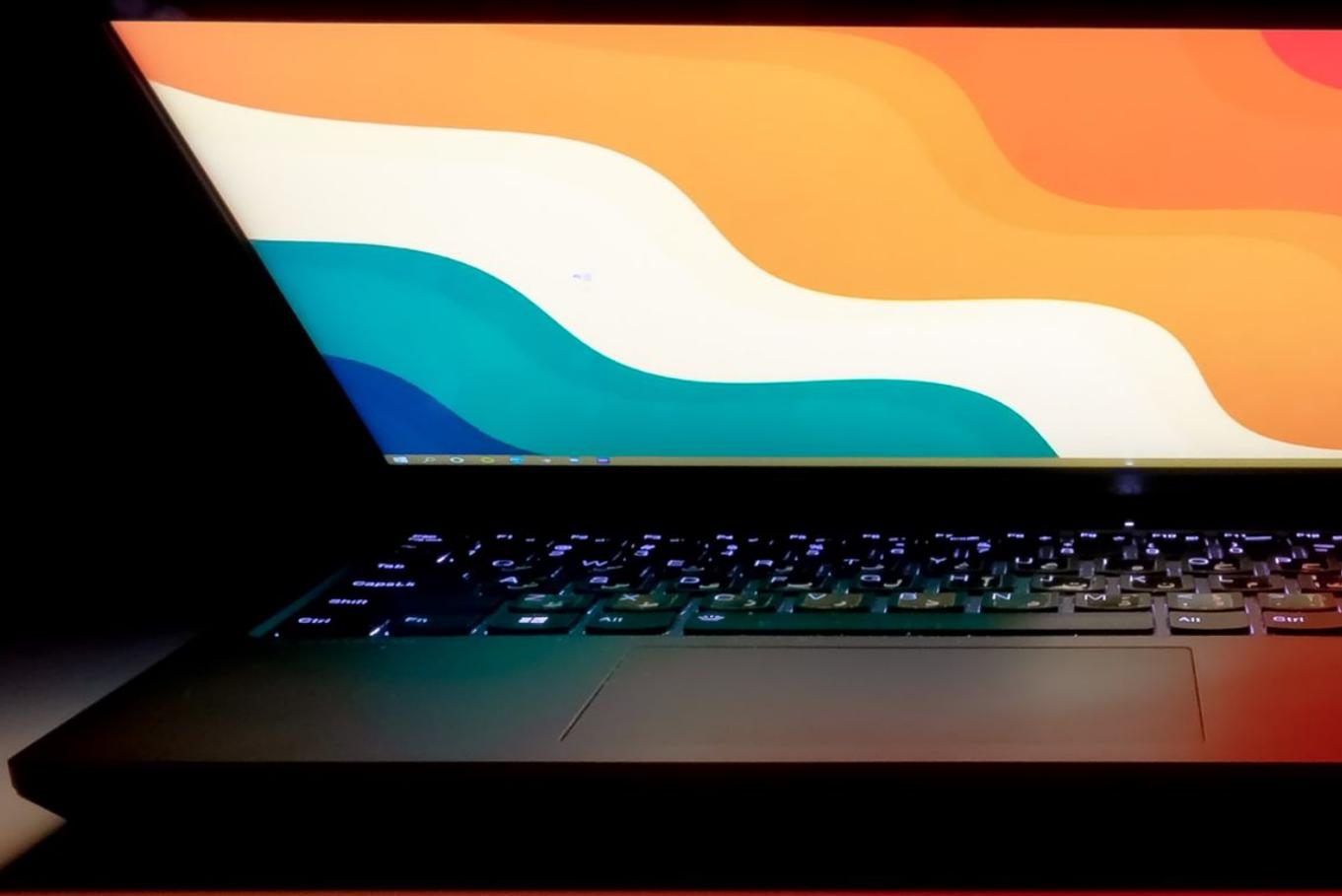
The best CRM systems for your small business will help you identify where to concentrate work—organizing and streamlining of all your business processes to make them better.



# Tip No. 2

# Outsourcing

Outsourcing allows you to get more done and trust important tasks and processes to professionals without having to actually grow your full-time team in a significant way.



# OUTSOURCING

After starting your business one of the most difficult parts is letting go of all the responsibility. Once you have decided you are ready to outsource, the next question is where to begin? We recommend starting with these three areas to ease into delegation.



## Accounting

Accounting is one of the most common areas where small businesses choose to outsource. If you're not a financial expert, then it can take a lot of time and skills to learn all the processes and compliance standards your company must meet.

## Administrative tasks

Our virtual assistants can give you more time and freedom to focus on doing the things that you love. You can work on the strategy for your business, developing deeper relationships with your clients or customers, or even have the flexibility to spend more time with your family.

We're the experts at working efficiently in a remote environment -- saving our clients time and money.

## HR

HR outsourcing can save you time, money, and stress, and those are just the top-line benefits. An HR outsourcing service can manage the whole human resources department for you, from managing payroll and processing benefits, hiring, and recruiting, training and more.

# Tip No. 3

## Automation & Sales

- ✓ Streamlining your processes is a great way to boost business and continue to grow your company for when it simply gets too challenging to handle everything manually.

# AUTOMATION & SALES



## Automation

- Workflow automation is an easy way to save money, boost productivity and improve your employees' work experience by eliminating tedious, time-consuming task.
- Workflow automation software can help you streamline communication, save money, increase efficiency, and empower employees with accountability and the time to focus on what matters.

A great place to start could be:

- Social media automation – Buffer, later.com
- Email automation through your new platform (see platform section for recommendations!)

## Sales

- Utilize your CRM for emailing customers. There are so many resources you can incorporate in the system you are already using!
- Save your email templates for easy responses.
  - Formatting an email takes more time that you realize. Save time by creating templates for your most used responses.
  - Prequalify your leads by designing a sales funnel to capture as much qualifying information as possible.
- Use this tool to vet your leads so you can spend more time on verified leads.
  - Create FAQs and YouTube Videos for your most common questions.
- This not only saves you time but also establishes credibility by providing further details and examples

# LOOKING FOR MORE ADVICE?

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