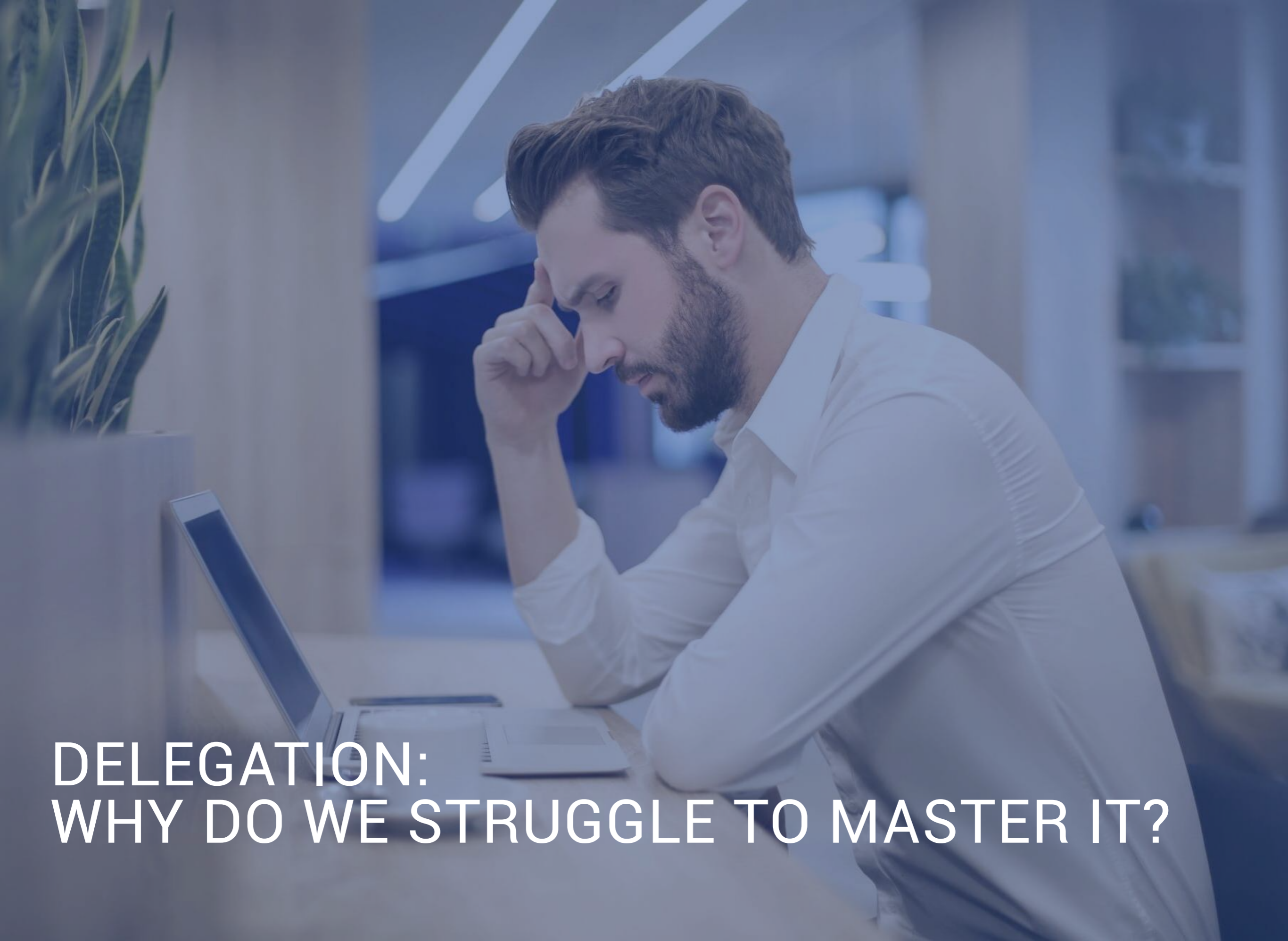




THE ART OF DELEGATION

How To Better Leverage
Your Time With Virtalent



DELEGATION:
WHY DO WE STRUGGLE TO MASTER IT?



In order to figure out how to delegate properly, it's important to understand why we *avoid* it.

Quite simply, we often don't delegate because it means setting time aside. Time we feel we don't have.

Delegation means stopping, explaining the tasks to another person and then checking the task has been done correctly. In essence, it's all about managing someone else.

Delegation is a skill, and one that requires your time from the start. It's this initial hurdle that many people fail to overcome. After all, which choice has more moving parts to think about?

A. You write the content for an ebook yourself, promoting a new service you've just launched.

B. You explain the task to your VA and have them do it instead.

Knowing you're going to have to stop and explain the task will cost you time at a stage when you already feel overloaded.



This perceived “loss” of time, often combined with not understanding how to delegate well, adds real friction to the process.

Yes, you know the content and your business inside and out. You can recite your company’s USPs in your sleep. It would be relatively straightforward for you to sit down and write it. It could even be fun!

However, the key question is: “Would completing this task yourself be a good use of your time?”

While on the surface it may seem easier for you to do this one task yourself, rather than explain to someone else how you’d like it to be done, permanently adopting this mindset will limit your personal and professional growth: you have missed the more

These reasons can be broken down into **time** and **skill**.

TIME

You hired a Virtual Assistant because you wanted to solve a problem: a lack of time. Whether you feel time-starved, simply overwhelmed with your workload, or stressed with little opportunity to do anything but work - you recognised you needed help.

But by continuing to do the work on your own, you are failing to address the problem you set out to solve.

You can't do everything yourself.

There are only so many hours in the day and trying to do so led to the issue at hand. As the business grows, your to-do list and number of plates to spin grows too. With each passing week, you have less and less time to work on each of your (often conflicting) priorities, meaning you not only feel overloaded, but tasks take longer to complete than ever before.

You need to break this "DIY" mentality if you want to grow a business without sacrificing absolutely *everything* in the process. to sustainably grow and lead a successful business.





Short-term, delegating can seem painful. But long-term, delegating really pays off: it will help you find more time to work on the tasks you enjoy and excel at, helping you to sustainably grow and lead a successful business.

You also need to understand what your time is worth compared to your VA's time. What is the trade off by delegating this task to your VA? What could you be doing with your time while your VA is working on this task? Could you be securing new clients or following up on sales leads?

What could you be doing with this time to grow your business?

It's important to think in terms of added value and opportunity cost, not only in minutes and seconds alone.

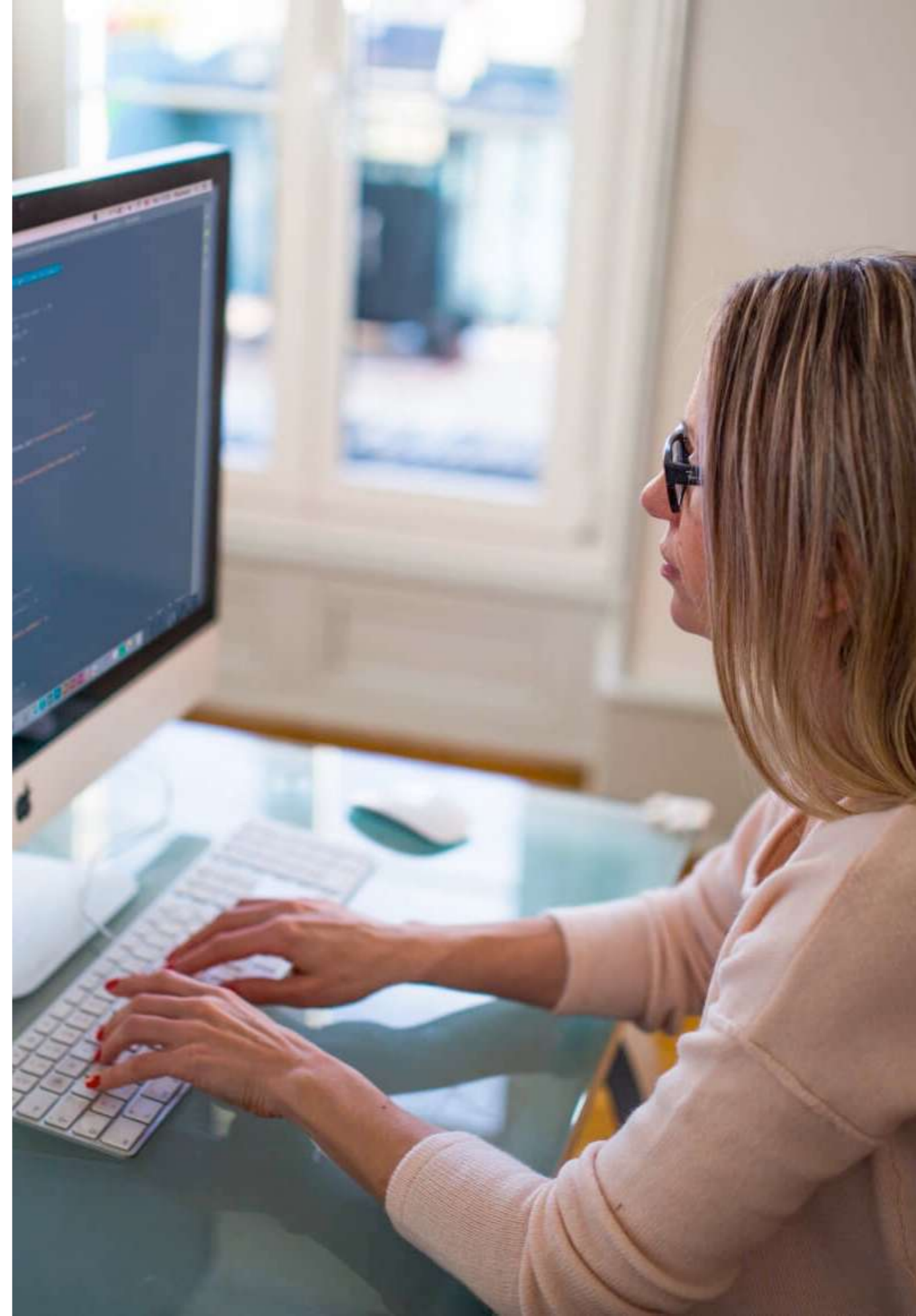
SKILL

You also might not have the skills needed to complete certain tasks, whether it's managing social media effectively or keeping on top of your inbox efficiently. You might have some ability to write a weekly blog post, but that doesn't mean you're the best person to do so. You'll likely take twice as long to achieve a result that's half as good as it could be. Even simply being organised is a skill few people can master!

Aside from the business case, you also didn't start your business to manage an inbox until the early hours, chase unpaid invoices or top up a Twitter account. That's why you sought someone who could.

Your passion fueled a desire to solve a problem, make something better and earn the freedom you've always dreamed of in the process.

Conversely, your VA chose to become a Virtual Assistant because they had a passion for what they do - the tasks you don't enjoy. They have the skill to take a lot of work off your to-do list, meaning the end result of aligning your two synergies together makes for a more efficient, effective and enjoyable way of working overall. It's a win-win!





WHAT DOES AWESOME DELEGATION
LOOK LIKE?

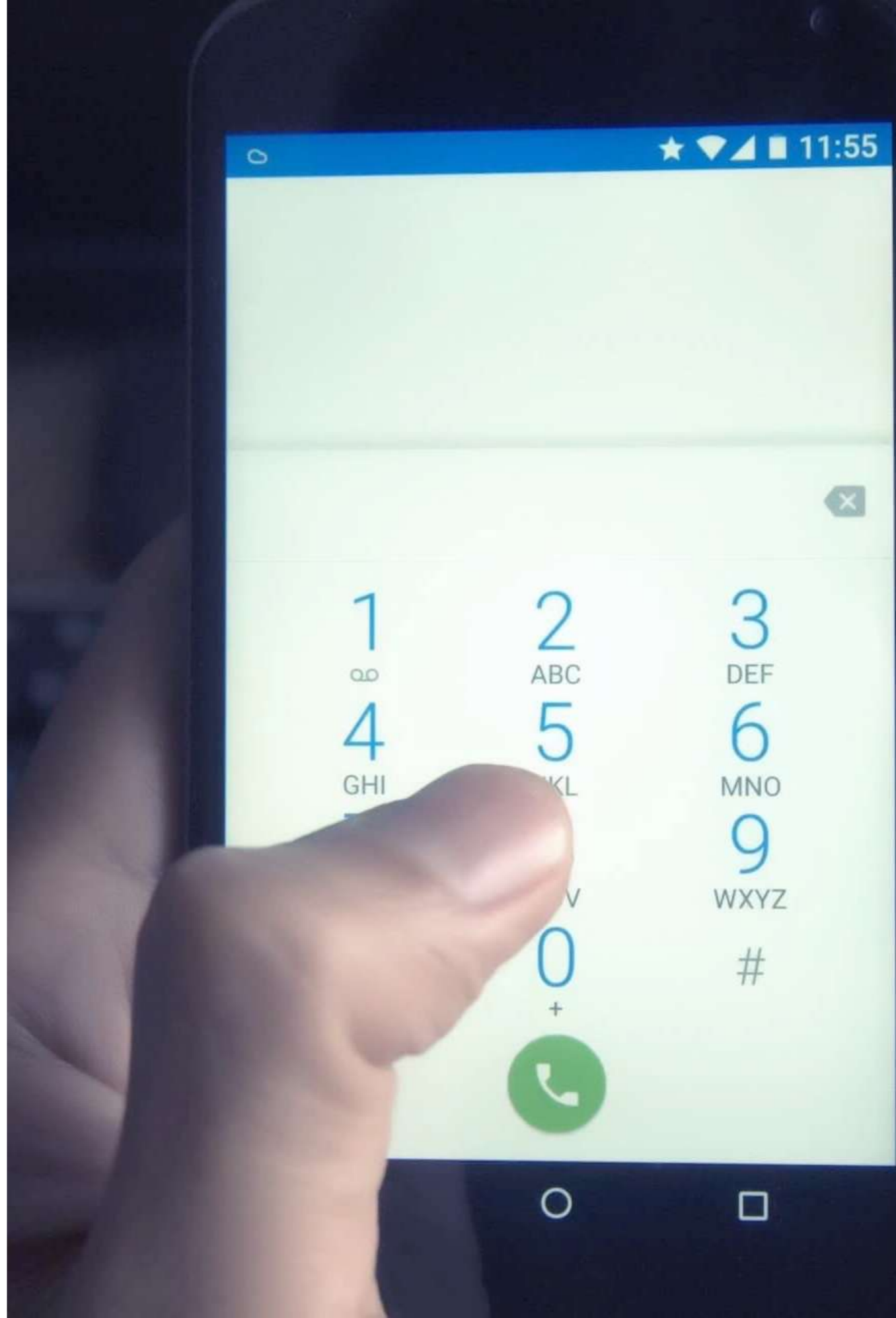
COMMUNICATION

A client who really knows how to delegate effectively gives clear, **concise instructions** and constructive **feedback**. This requires mutual respect, clear communication and trust between both the client and VA, working together to achieve the client's objectives.

Awesome delegation also means that the client is happy to **listen** and answer any questions their VA might have to support their work.

Lack of communication, direction and instruction is a barrier to effective delegation. Poor delegators assume their VA has all the information they need: unclear explanations and a lack of information can lead to weaker rapport, reduced natural interaction (they're not in your office don't forget!) and, ultimately, mismanaged expectations.

We can all fall foul of understanding what we mean in our heads, but not actually explaining it fully or clearly enough to another person.

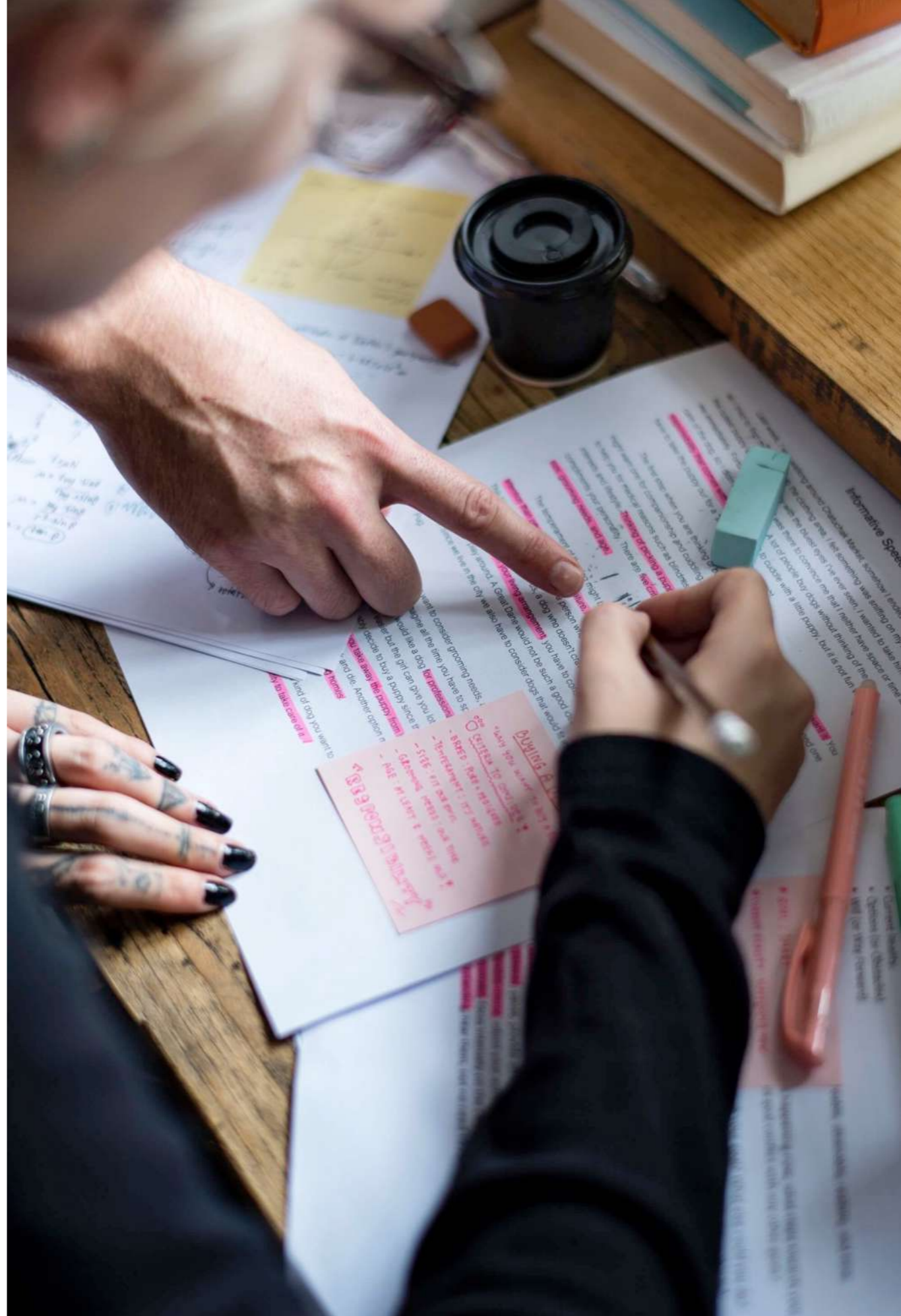


PREPARATION

An effective delegator is **prepared** with everything their VA needs from day one so they are ready to hit the ground running. They will be aware of what tools and software their VA will need access to and are ready to onboard their VA as a fully-fledged member of their team.

Most importantly, they know *exactly* what the role of their VA will be and will have set out clear expectations and defined responsibilities.

They are prepared with as much information as possible to pass onto their VA. Company overviews, handovers, processes - anything to help their VA understand the vision, mission and objectives of the business.



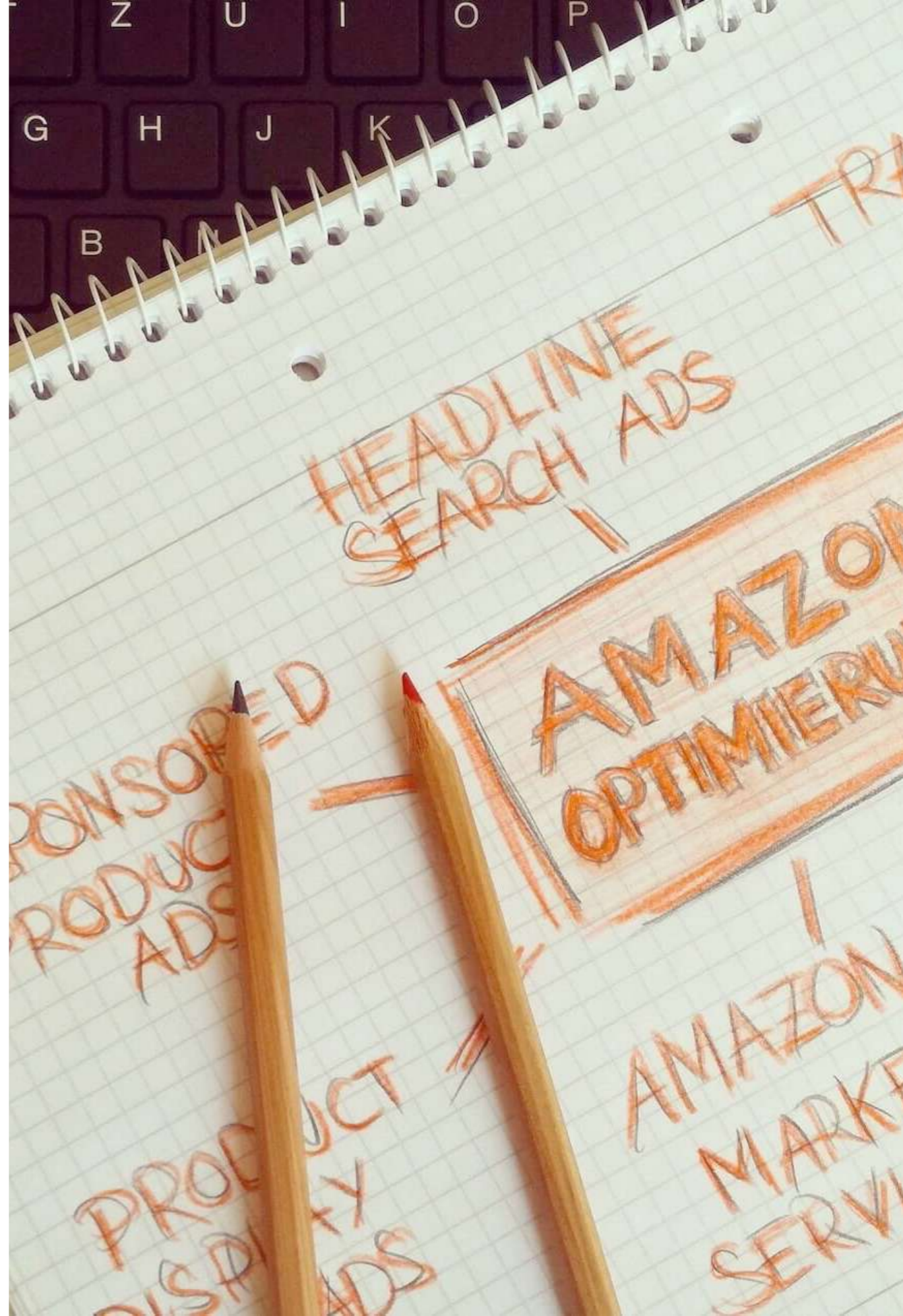
OBJECTIVES

Successful delegators also have a clear understanding of **why** they hired a Virtual Assistant in the first place (hint: to better leverage their time) and are prepared to set aside the time and effort to make this business investment, like any other, truly work.



"Effective delegation is when clients recognise their time is precious and that I am better suited to the more labour intensive tasks than they are."

Georgina
Virtalent VA since 2017



TRUST

Clients who know how to delegate effectively realise the need to trust their VA. That means they give their VA the space and authority to be able to do what they do effectively and efficiently. This also means that, later on down the line, the client has developed enough confidence to give them even more responsibilities, expanding the VA's role beyond day-to-day assistance to work which requires a more holistic, managerial approach.

The first few weeks of working together are the most important, laying the foundation for the months to come. The initial tasks you delegate are an opportunity to start building trust as you begin to rely on your VA. Give them the opportunity to show you that they are indeed that experienced and highly-capable individual that you decided to work with!

Effective delegators often start by feeding through a couple of smaller tasks to get used to how best to work with each other. Over time, your VA will learn more about you, understanding how you like things to be done and how your relationship needs to work for you.





It's crucial to keep these factors in mind: set aside time and space to dedicate to your VA rather than just focusing on the work they have completed for you. Make a dedicated effort to build rapport and continually keep your expectations aligned (jump on more phone calls together rather than relying on quick messages to and fro!).

Delegation is about trusting someone else to do the job and then, importantly, handing over control. Being unable to let go and control every aspect of the work is where a lot of clients struggle and fail at delegating.

How Do We Help?

Virtalent works to give you peace of mind from the off:

- We match you with a carefully vetted, experienced UK professional.
- All of our team are background checked by Onfido.
- We abide to strict confidentiality clauses in our agreement with you.
- All tasks are insured by Hiscox, for complete peace of mind.
- We all have G Suite access: 100% secure cloud storage, emails and more.
- Your Client Success Manager is always on hand to provide extra guidance.



**CASE STUDY: MARTIN AMOR - FOUNDER,
COSMIC KIDS**

MEET MARTIN AMOR

You hired a Virtual Assistant for one reason: the struggle.

Whether you were juggling the demands of a growing customer base, missing important deadlines, not spending enough time with loved ones at home or just feeling totally burnt out, you realised you needed to do something.

Martin, who has been a client for over 2 years, tells us why he hired a Virtalent VA.

Martin is the Founder of Cosmic Kids, a company that teaches children about yoga and meditation online.

Martin was completely swamped with work.

While his company, Cosmic Kids, was doing well, he just couldn't keep pace with the numerous online teacher training enquiries every day. As Martin was spending a great deal of time running the business itself, following up with these leads took a backseat.

He was increasingly frustrated and overwhelmed. But he couldn't afford to miss opportunities. It was time to find a new team member – someone capable of handling new business and student support – in a timely and professional fashion.



He needed a practical, rational solution. However, when scoping out the role further, it was clear he'd need someone to really absorb Cosmic's products, services, and philosophy – someone able to sell the idea and convert interested customers. Martin needed someone committed, but didn't want to hire a permanent member of staff.

Martin needed to act quickly, before the situation began to impact his professional ambitions and personal goals any further.

As he puts it himself, "There was too much noise and not enough signal."

Fortunately, he found Virtalent online and we matched him with Frances.

"I was surprised at how transformative it was. It made such a positive difference – to my life and my business, and my relationship.

"The impact is greater than you could imagine. It's like someone throwing a rope ladder down to you and letting you walk up."

Delegating just 10 hours per month gives him enough time to get some much needed headspace, enabling him to focus on being more creative, coming up with new ways of growing Cosmic Kids and bringing yoga and mindfulness to kids across the globe.

Such a positive mental change has significantly reduced Martin's stress levels by filtering out any distractions. This makes his work more enjoyable, as Frances essentially takes charge of the work he struggled to address previously.

The effect on him personally, and on his relationships, has been huge too. The overall impact has been far greater than he ever imagined. So much so that he "feels 5 years younger!" and the end benefit has been "better than joining a gym!" in terms of impact on his mental health and wellbeing.



DELEGATING EFFECTIVELY: WHERE TO START

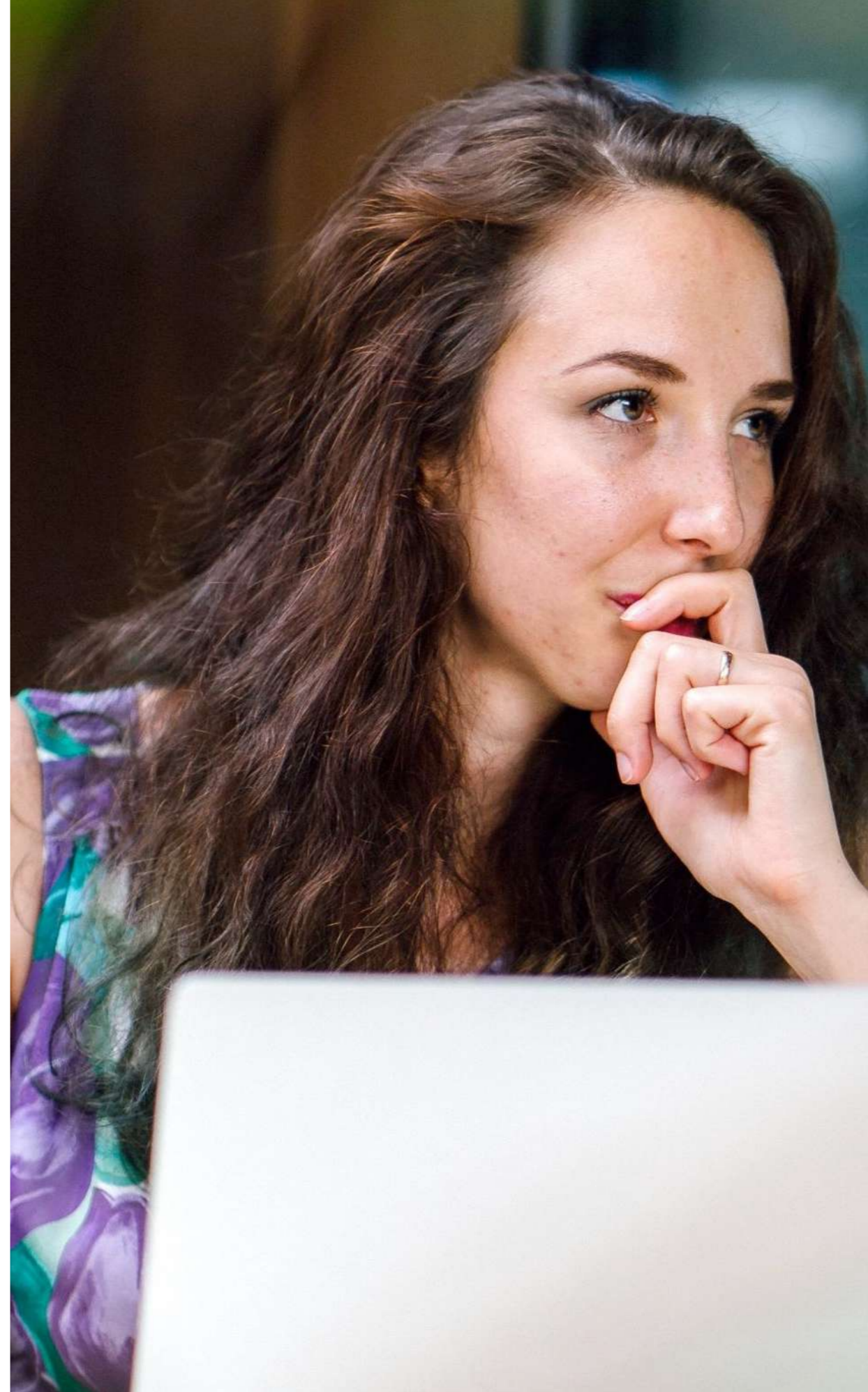
1. UNDERSTAND YOUR OBJECTIVES

Before you delegate your very first task, take some time to think through the new role you have created for your Virtual Assistant: what do you need and what do you expect the end result to look like?

Try and understand what your objectives are and what you're trying to achieve by hiring a Virtual Assistant.

- Are you trying to free up more of your time so you can get home earlier?
- Do you want to free up more time to dedicate to your clients instead?
- Are you looking to increase your sales?
- Is your team growing and they need an extra pair of hands?

If you are struggling to delegate to your VA, reminding yourself of your main objective will help to focus on why you need to start delegating more and help you prioritise the work you delegate.



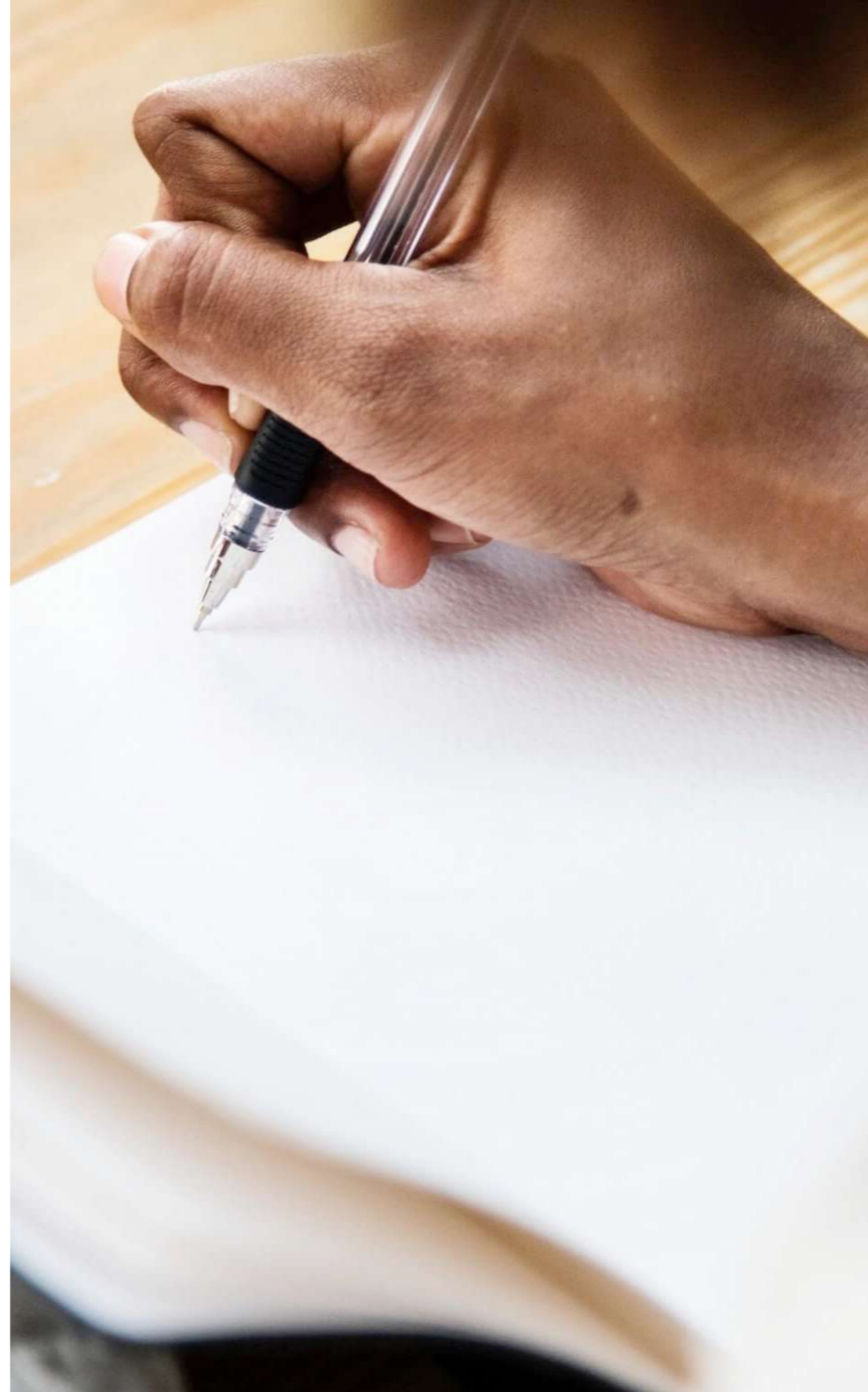
2. DEFINE THE ROLE

Work together with your VA to create a list of repeatable and ad-hoc tasks that they are going to be responsible for. Ensure that your VA fully understands what is being asked of them.

If you want to delegate more work to your VA, but you're not quite sure where to start, make a list of everything you typically do each week and then separate out those tasks that you shouldn't be doing (if you want to better leverage your time as a business owner) or can't do yourself. Categorise them:

- One off - event planning, website updates or research
- Ad-hoc - travel arrangements, content creation or marketing campaigns
- Recurring (day-to-day) - invoicing, inbox management, diary management or social media

Then delegate everything you possibly can from this list.





“Starting with a task like email management is great because not only does it relieve the client of any stress, it also gives the VA a chance to understand the role and situation a bit more, because you can find out valuable information from their recent correspondence. It's surprising how much information a client can forget to tell you about their business as their minds are so cluttered. By doing a bit of internal research, you can find your own work and come up with a solution for them effectively.”

Steph

3. ALIGN ANY EXPECTED OUTCOMES

As well as understanding the task instructions, it's important that your VA understands what is expected of them. Are these expectations realistic and achievable?

- Do some of the tasks **need** to be completed in a certain way?
- Do you **prefer** some of the tasks to be completed in a certain way?
- Is there a "house style" or best practice within the company or industry?
- Are there key deadlines involved? Are these business critical or a preference?
- What other tasks or projects does this relate to?

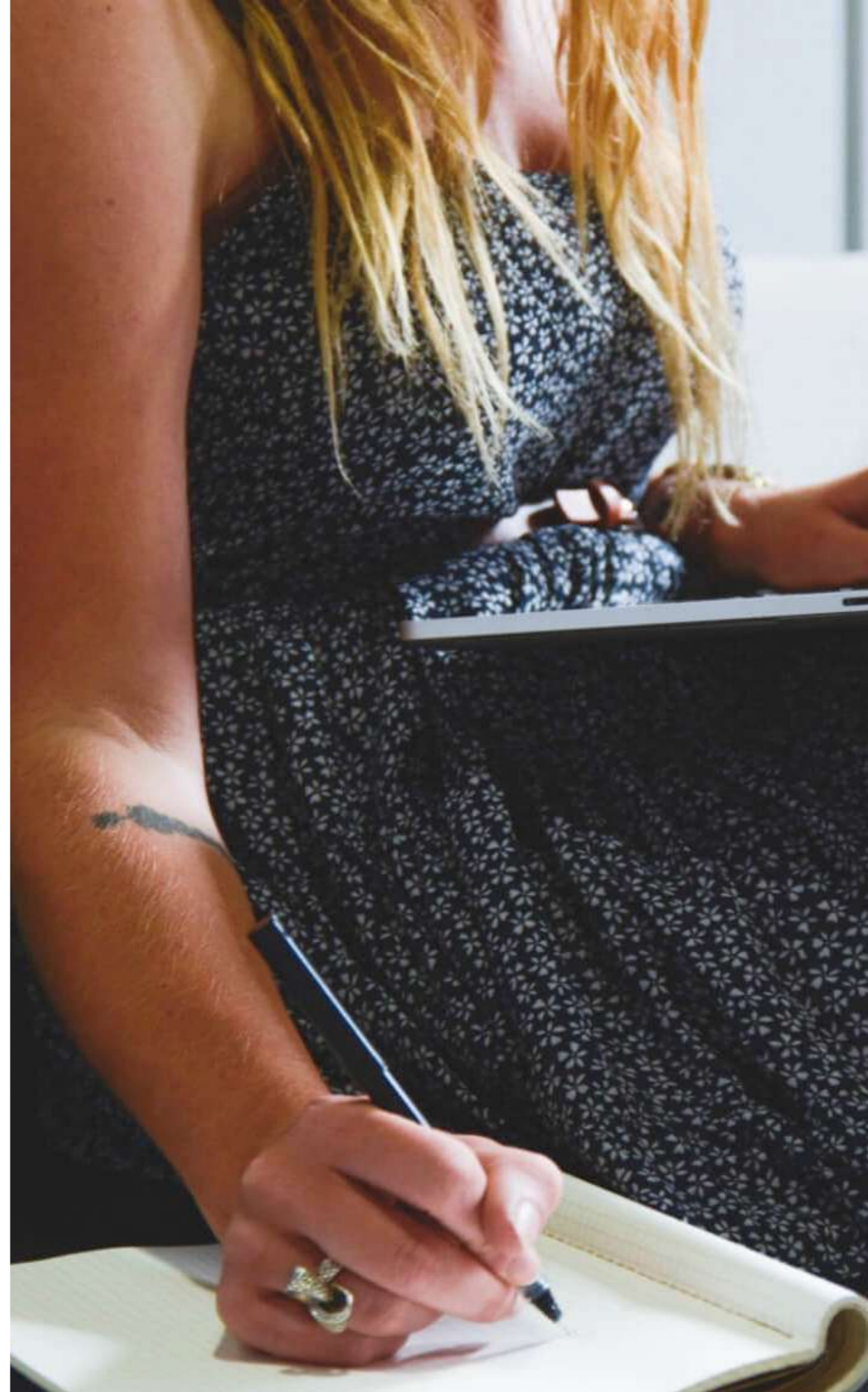


4. ENCOURAGE SUGGESTIONS AND IDEAS

Working *in* your business instead of *on* your business can leave you blind to the way certain things are done. We all suffer from myopia. By hiring a new VA, you have a fresh set of eyes - backed by many years of experience working on similar tasks and projects for other companies - to look at how things are being done and how they could be improved. Your VA has been there, done that and got the t-shirt - a smart business owner will make use of their insights!

Empower your VA to make suggestions or discuss improvements. They may be able to define a more efficient approach- it's a win-win as far as you're concerned. If they can free up a few hours each month by creating a new efficient process, what other value can they add to your business with the time both they and you have saved?

Clients often know what they want to achieve on some level, but are unsure of the best way to get there or even what the end result should look like exactly. That's where your VA steps in. The key is to make it clear this is what you would like!





GETTING STARTED: PRACTICAL STEPS

It's important to get your relationship off to the best start possible, paving the way for a solid, long-term working relationship you can benefit from for many months and years ahead. Let's take a look at the practical steps to follow from day one.

KICK OFF CALL

You have now created your account with Virtalent and made a formal commitment to work with your VA. The first step is perhaps to set up a call to plan your first few weeks together. Building on the previous section, suggested topics to cover on your initial call could include:

Your business - Ensure your VA has as much information about your business as possible - background, purpose, how the business got started, etc. Explaining how the business began can be a meaningful way to integrate your VA, ensuring they are onboard and can contribute to the overall mission and vision of the company.

Your team - Are there any relevant people that they should be aware of, including any suppliers such as accountants? Think about people they might be liaising with, both now and in the near future (and don't forget to introduce them to your new VA after the call!).

Your goals - What's the bigger picture? What are your goals? Why did you hire a VA? Also make it clear whether they should they share their own ideas to help get you there or you would rather they simply follow instructions.



Your expectations - How do you like to work; what can they expect from you? What makes you tick; what do you expect from them? How will you give feedback to each other? Be open and honest.

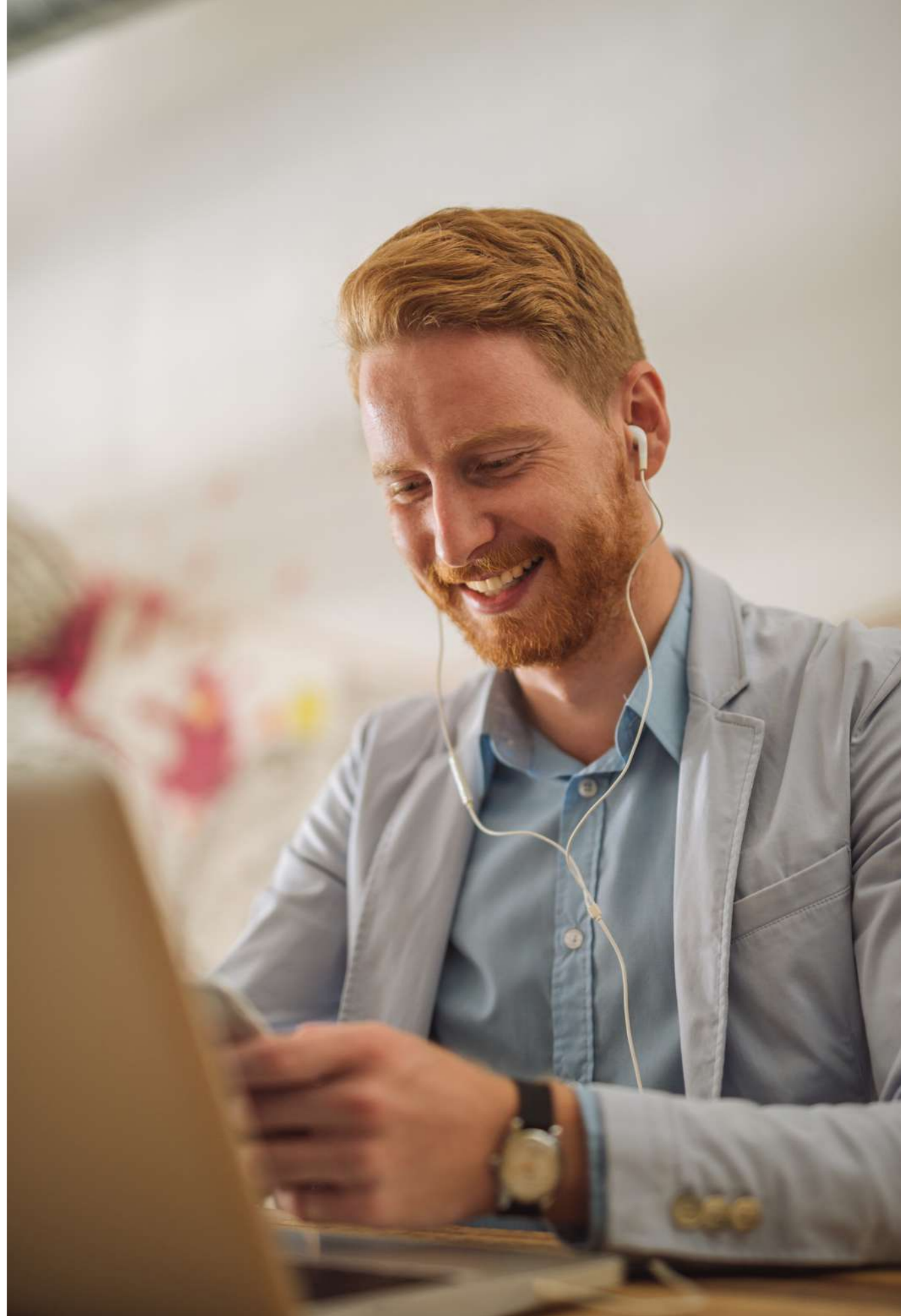
Hours and availability - Are you happy for your VA to use the time they need or is there a hard limit in place? When do you work? What's your VA's schedule? How often do you want to check in with each other?

Systems and software - You'll need to provide your VA with access to the software and tools they need. What are these tools? How would you prefer to communicate (email, WhatsApp, etc.)?



“When I have an initial phone call with the client during the matching process, I'll always make notes from this first conversation. If the client creates an account, I can then refer back to these and make suggestions on where to start!”

Clare
Virtalent VA since 2018



DEFINE INITIAL TASKS

If you are unsure where to start, perhaps begin by delegating 3 tasks, however small, that your VA can be working on from day one.

From our experience, the most popular three tasks are:

Research - this can be delegated with relatively little time involved. It usually has mutual expectations involved from both sides and a clear outcome involved.

Email management and travel bookings - organising emails is a great place to begin as this is often the hub of a business and can leave most business owners feeling quite swamped. Not only does a healthier looking inbox help to relieve your stress levels, but it helps the VA to develop an understanding of your business without needing to ask you too many questions.

Financial administration - chasing invoices, inputting expenses, and so on. Most bookkeeping software are all similar and makes it very clear what tasks need to be completed. There is also often little context or extra understanding needed.

"Think of tasks that have a repeatable process behind them that your VA can work on continuously without needing much input from you."



"If a client is struggling to know where to start, I usually suggest some diary management or booking travel - something that takes them ages to do, but takes me minimal time can show them the difference of someone else doing the task can make to their day."

*Lisa
Virtalent VA since 2016*

CHOOSE TOOLS AND SOFTWARE

← Do not disturb

Do not disturb
When enabled, your phone will only ring or vibrate for priority interruptions (including alarms), and a moon icon will appear in the status bar



SCHEDULED

Time
Sun Sat
10:00 pm - 7:00 am next day



Event
Any Calendar



Add new

TOOLS & SOFTWARE



If you think it will be needed (e.g. for diary management), now is also a good time to ensure your VA has:

- A company email address.
- Access to your calendar and your inbox delegated to them.
- Access to relevant documents.
- A shared to-do list where you can delegate.

There are a whole host of extra tools and software out there that can help you on your delegation journey, to take this a step further.

Great examples include:

Process Street - or a simple document which outlines any key processes for your new team member to follow. (Why don't you ask your VA to start documenting processes as they're doing them so they are always there for anyone to pick up for future reference?). Google Docs is also a good option.

A video conferencing tool - as well as Google Hangouts, you might prefer Skype, Uberconference (for audio only web calls) or Zoom.



Day-to-day comms - Slack or WhatsApp are useful additions to using email.

Cloud storage - GDrive, Dropbox or OneDrive can help store your documents in one safe and secure place.

Collaborative working - if you are working together on documents, Google Docs is a great place to start. Your VA can always transfer ownership to you once the document is finished, if you need to add sensitive information to it.

To-do list app - you might benefit from project management software or a to-do list app. We recommend Asana, Wunderlist or Trello, depending on the tasks and projects you need support with.

A group of business professionals are gathered around a table in a meeting room. They are all smiling and looking at documents on the table. The room has large windows with white blinds. The overall atmosphere is positive and collaborative.

DELEGATING BETTER: THE FUTURE

You've likely got off to an excellent start, but it's still important to regularly review the relationship and check that both of you are working together as effectively as possible. Try to set milestones in your calendar to take a "birds eye view" of your relationship. Could anything be improved?

A close-up photograph of a person's hands writing in a notebook. The person is wearing a dark, patterned sleeveless top. A laptop is visible in the background, and the person's left hand is holding a pen over the notebook. A green banner at the top of the image contains the text 'REVIEW WORK & PROVIDE FEEDBACK' in white capital letters.

REVIEW WORK & PROVIDE FEEDBACK

A productive and happy working relationship relies on feedback from both parties.

Your new VA might be the first team member you've had and you may rely on their input on how to manage the relationship, just as they should seek constructive feedback from you too. After your first month together, ensure you take time to review how this has gone.

Your Virtual VA

- Could they be doing anything better?
- Do you need more information from your VA?
- Are they fully aware of their role and the responsibilities they have in your business?
- Are there any points of friction with a process?
- What suggestions do they have to improve process or increase efficiency?



You

- Could you be doing anything better?
- Do they understand everything you do for them, or could you be clearer?
- Do you communicate clearly, concisely and often enough?
- Is your VA comfortable with the workload and do they understand your working style and approach?
- Have you asked for their feedback on new and improved ways of doing things to make their work more efficient?

REVISIT INITIAL BRIEF AND TASK LIST

Go back to your original “brief” from your initial consultation call with Virtalent, and the notes from your first call together with your VA.

Are you delegating all of the tasks that you originally spoke to us about? If not, why have you decided not to delegate this?

Now that you've established a good working relationship with your VA, where else can they add value? Are they skilled in a certain area that you didn't realise before or has a new project developed where you think their experience will be relevant?

If you feel that you would like to delegate more work, but your VA would struggle with the increased workload, please speak to your Client Success Manager so we can ensure all your tasks are accommodated.

We might be able to assign a second VA to the account, either with different or complementary skills to your other VA's, or even look to assign you a VA with much more capacity if your needs have changed dramatically.



MAINTAIN COMMUNICATION

You're a very busy person. You know that. Your VA knows that. We know that. However, one thing that you should always make time for is speaking to your VA. It's surprising how days and weeks can go by without stopping and speaking to them.

Ensure you schedule a virtual meeting with them at least once a month to go over tasks, achievements and future goals. It's also a good opportunity to see what else they can be taking off your plate. Your workload can change all the time, yet your VA is the *constant* force helping to break this down.

With an ever-changing schedule, it can be easy to become distant from your VA. The challenges you faced which led to you hiring a VA are soon forgotten and replaced with new demands. That doesn't mean these problems have disappeared, just that you have others to deal with now. Your focus shifts away from the work your VA does, to the new work piled onto your plate, and it's easy to take the support for granted.

My VA knows how busy I am and that I can struggle to communicate at times. I know she has access to my calendar so I encourage her to book a time slot into my diary to get hold of me. It's a sure fire way of both of us knowing we have a dedicated half an hour to catch up and talk about our objectives and what needs to be done. I leave this completely up to her to do as she knows better than me when I'm falling behind and not allocating tasks to her. Sending emails to me knowing that I'm not going to read them won't ensure I'm getting the most of her. I enjoy that pro-activity, knowing she directs me.

Client testimonial

Now, more than ever, is the time to remind yourself why you hired a Virtual Assistant in the first place. It's important to continually realign the relationship.

- Have they achieved this aim or has this changed now you've begun working together?
- What do you want to do both personally and professionally, in the short-term and the long-term?
- How will your VA help you to achieve these goals?



“I always suggest that they have a good think about why they need a VA. What are they struggling to keep up with that they really need help with? For a lot of clients they have so much to think about they often just don't know where to start. It's my job to talk them through everything so, together, we can come up with a plan that will make them more time efficient and allow them to focus on the job they do.”

Georgina
Virtalent VA since 2017



A blue-tinted photograph of a meeting around a wooden table. In the foreground, a person's hands are gesturing, with one hand open and the other pointing. In the background, another person's hands are resting on the table. The overall scene suggests a collaborative discussion or meeting.

DELEGATING STRATEGICALLY: LOOKING
BEYOND YOUR TO-DO LIST

BEYOND THE TO-DO LIST

It can be difficult to know where to start when it comes to “thinking strategically” and so often it’s simply easier to focus on the task at hand, delegating work as and when it comes in. But, long-term, this does not always make for an effective relationship.

Put simply: setting time aside to analyse problems in your business that need to be solved and working with your VA to solve them will help you to effectively and efficiently grow your business.

Here are some practical examples to get your creative juices flowing.



EXAMPLE 1



Challenge

You have countless sales meetings scheduled in your diary and are feeling overloaded and under rewarded.

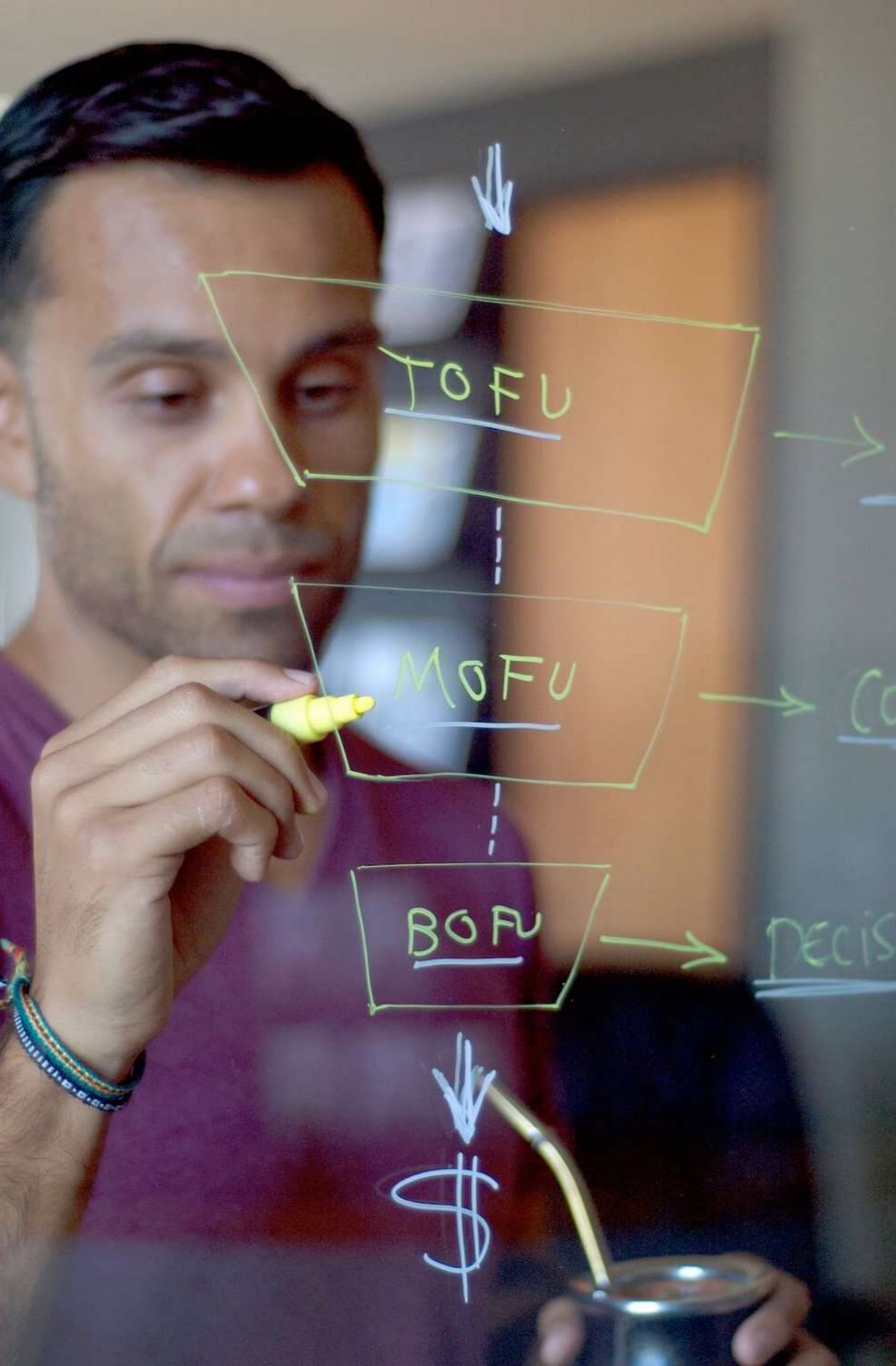
You spend each week going from meeting to meeting, but you suspect that few of the pitches turn into new clients.

You discuss this in more detail with your VA, telling them how you prepare for the pitch, how you usually present it and how

you follow up afterwards, but there is little done on any of these fronts as you are always trapped in the meetings.

Solution

While you're jumping from meeting to meeting, your VA can make well-researched prospect client profiles. These are waiting on G Drive ready for you to scan over whilst on the train, making you better prepared to get that sale. They've also spent time preparing the pitches for the week: now you have a slick new design, everything has been proofread for errors and your



VA has worked with an external designer to create some impressive mockups specific to each client.

Then, once the meeting has been completed, your VA sends a follow up email and e-brochure to the client that very same day thanking your prospective client for their time and letting them know they will receive further information from you in the coming days. That lead just got a little warmer.

A few months later, you are winning so many new clients that you don't need to work at such a frantic pace: your VA's insight has completely transformed your personal life and the business is growing at a record pace!

EXAMPLE 2



Challenge

You aren't using or developing your company's social media channels.

That marketing strategy overhaul you paid for months ago is gathering virtual dust in your Dropbox. You've not had time to even review it since your marketing agency created it. In the meantime, your online presence is poor and doesn't represent who you are as a brand any more. Although you aren't from a marketing background, you discuss this with your VA.

You would like to do more with social media such as promote upcoming events and new product launches, but don't have time to create the content, schedule it or respond to any engagements it would generate. Your VA suggests that you could use a Marketing VA at Virtualent to do this for them. You soon realise your social media has been seriously overlooked.



Solution

You speak to your Client Success Manager, who assigns a Virtalent Marketing VA to your account to manage the day-to-day work.

A few months later, they have been managing your social media with great success. They now also respond to questions and share relevant influencer content to bring the company more exposure. They have also streamlined the company's online presence to ensure it better reflected the brand, and this led to better quality sales leads.

Now you and the Marketing VA are discussing blog posts for the website and running competitions and giveaways on social media. With all this in place, you can feel confident to include social media in your marketing plans without the pressure and dread associated with it before.

EXAMPLE 3



Challenge

You are taking a very reactive approach to customer service.

You find customer complaints are always discussed at length and prioritised ahead of anything else, for fear of further escalation. This leaves no time to thank clients for their continued business, “wow” them or share positive feedback with the team. It has created quite a noticeably demotivating working environment for everyone on your team.

You are so focused on short-term goals, that you pay little attention to your (largely ignored) client base of happy customers. You agree with your VA that your happy paying customers need to be looked after better.



Solution

Now your VA documents feedback, both positive and negative, ensuring it is acted on and directed as appropriate so nothing is missed. They also share positive feedback with the wider team to boost motivation.

They create a monthly report which identifies recurring issues to be solved and, importantly, what feedback customers have given to help solve them. Your VA then works to improve the processes going forward. Your VA also contacts happy customers who have provided great feedback internally and pushes them to leave reviews on Google and Trustpilot, building up a solid stream of glowing reviews for the next prospective customer to be convinced by.

Next month, your VA is going to work on some ideas for a new client referral scheme to win more referrals from your happy customers and a number of incentives to keep those customers far into the future. Once they have these ready, they're going to call each client to "check in" with them, seek feedback and share these new initiatives!

EXAMPLE 4



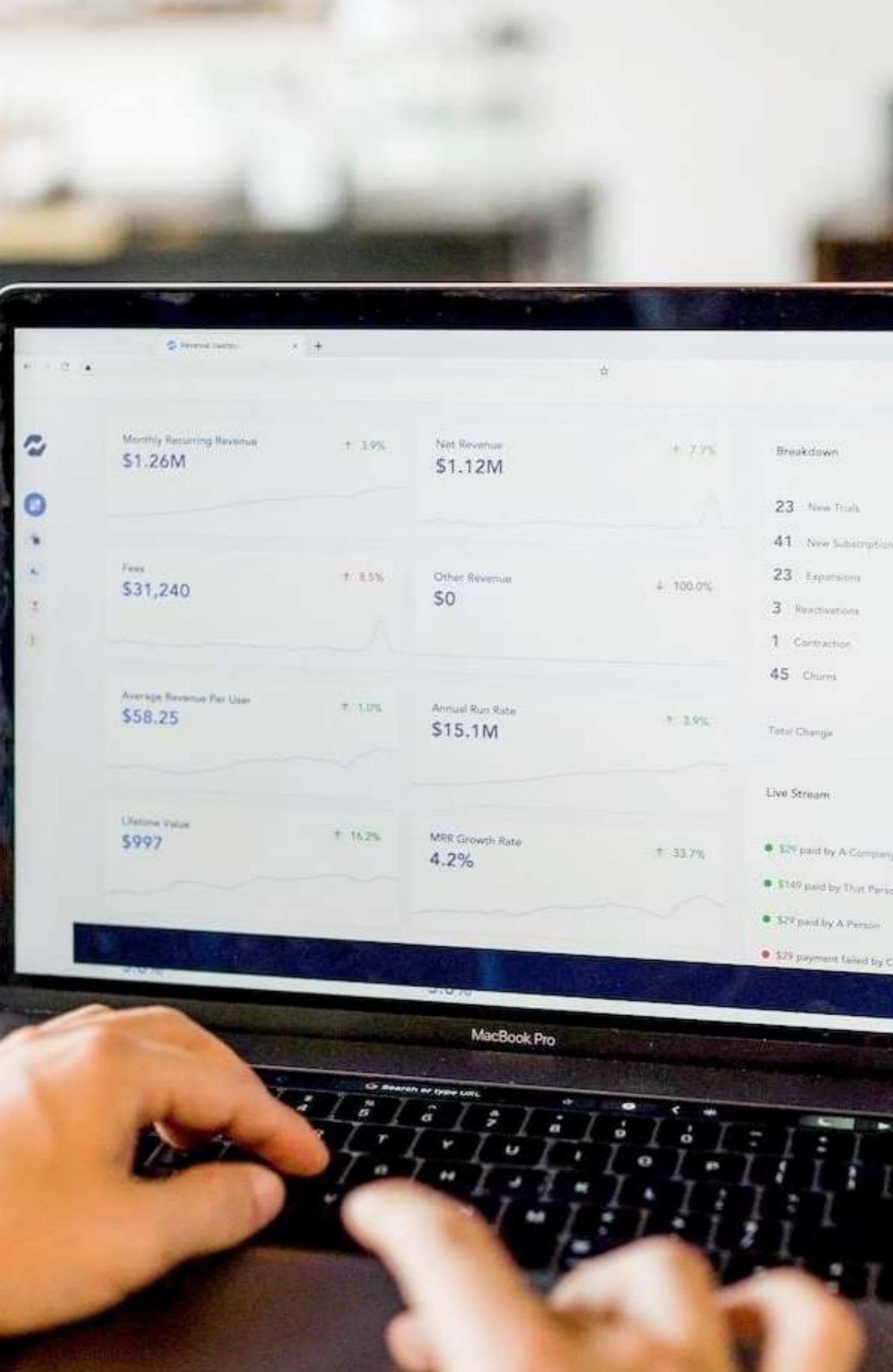
Challenge

Your VA can see from sorting your inbox that many clients are regularly paying late.

There has also been a few times when your accountant has said that VAT returns haven't been submitted by the deadline, because expenses weren't filed in Xero in good time.

Your VA mentions this to you and you confess that financial admin is an area you struggle to keep on top of. You're so busy

that you don't have time to check you have even invoiced all your clients, let alone making sure they pay on time or attending to any other financial tasks. No wonder it's messy!



Solution

Now, your VA raises all client invoices at the end of completed projects, making a note of these in the new CRM they suggested. They keep an eye on the bank feed in Xero to ensure these are paid by the due date. Your VA has had to send a few firm emails, but clients now pay on time. Part of the new efficient process your VA suggested was that you now upload all of your expense receipts to Dropbox, which they file in Xero, and they are on hand to give your accountant any other information needed to file everything by the deadline.

Your VA even sends you a monthly report from Xero of your sales figures and overheads, so you start to get a better grasp of how the business is growing.

You are now paid on time and HMRC always receive paperwork on schedule, reducing your stress levels significantly and improving the cash flow of the business so noticeably that you have asked Virtalent to move you to a higher Support Plan as your business grows.

EXAMPLE 5



Challenge

You have launched a number of successful marketing campaigns and the response is overwhelming.

It's great news! However, your attitude has changed from excitement about growing the company to anxiety and fear around coping with the workload. You're also going increasingly quiet as a result and so haven't been able to connect with your VA for a while now.

You're struggling to keep on top of the increased number of leads coming through and are aware your existing team needs to expand to cope with the number of new clients being won.

You've started interviewing people, but the candidates are quite poor - mainly because the job ad is poorly thought out and you haven't had time to post it anywhere other than one job site. You also struggle to find the time to manage your sales pipeline.



Solution

Your VA books a call into your diary to break the pattern of silence, and agrees to take recruitment off your hands. You explain on the phone exactly who you are looking for and they use this to overhaul the job ad. You set your VA a budget to work with and they use this to post an ad on several industry-specific job boards. Within just a few days, the number and quality of applicants being received increases, so they then step in to screen candidates. They reject any that don't meet the criteria and move the rest to the next stage, sending them a Google Form to complete which assesses their suitability even further. They then shortlist and book interviews with the best candidates into your diary.

They also begin to check your CRM once a day, following up with any sales leads that you have sent a proposal to but that haven't responded.

The end result of your work means that you soon welcome two new team members, both of whom you have been able to hire without jeopardising the new sales leads the campaigns have been generating for the company. The extra work going into following up with sales leads also looks like it will effectively pay for one of these team member's salaries! The extra new clients being won each week as a result of your VA's proactivity has been very noticeable.

QUESTIONS?

Always feel free to lean on your Client Success Manager!

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