



Virtual Assistant Delegation Blueprint

A Guide to getting the most out of hiring a VA

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Building the Relationship

YOUR ASSISTANT IS YOUR CHAMPION.

Your Virtual Assistant is your newest champion, here to help you succeed day in and day out.

Like any other teammate in life (your friends, your family, your coworkers) strong relationships lead to meaningful experiences. You'll develop a strong working relationship with your VA over time, beginning with an introductory call.

Take this time to get to know your VA and help them get to know you. Your VA will address specific questions in the call to help him or her best support you. Within this eBook, you will find best practices, routines for success, and a list of typical tasks to help get your creative juices flowing!

PRO TIP

Let's kickstart your delegation with a pro tip. The best tasks to delegate are tasks that generate income for you and your business.

Maybe it's having your VA spearhead lead generation. Maybe it's asking them to create custom email campaigns. Maybe it's requesting that they repurpose your old marketing content. Whatever industry you're in, think of the tasks that have the greatest impact your ROI, and consider delegating those first.



TYPICAL TASKS

Calendar Management

- Booking new meetings or calls
- Confirming meetings or appointments
- Rescheduling conflicts ahead of time
- Scheduling work lunch or drinks
- Adding "do not disturb" blocks
- Ensuring personal appointments do not conflict with work

Travel

- Researching airline, hotel, train tickets
- Researching different travel paths / options
- Purchasing tickets
- Check into flights 24 hours in advance, emailing boarding pass
- Assisting with TSA pre-approval Researching personal or work-retreat
- Researching personal or work-retreats
- Vacation & itinerary planning

Inbox Management

- Deleting junk emails
- Unsubscribing from newsletters
- Archiving old emails
- Flagging high-priority items that need attention
- Creating a priority system of folders
- Moving low priority items to subfolders

Drafting response emails

Sending emails at a later (scheduled) time

Researching better inbox systems or strategies

Purchases

Researching various products

Creating online wish lists

Overseeing and tracking Amazon orders

Gift orders

Online ticket orders & queue holder

Anniversary, birthday, etc. gift ideas

Research

Due diligence on people, products, or services

Deep dive research on competitors

Data Entry

Excel, Google Sheets, Sage , Xero etc. entry and maintenance

Lead Generation

Email finding

Lead generation spreadsheet (creation, tracking, follow up)

CRM creation and management

Customer conversions

Social Media Management

Content curation

Content calendar planning

Responding to customers on social media channels

Adding content to queue for distribution at a later time

Accounts and Bookkeeping

Processing and paying supplier invoices and bills

Managing company bank accounts

Raising client invoices

Cash collections

CIS , VAT and Tax Returns

ROUTINES FOR SUCCESS

Some suggested routines that lead to great relationships:

1. Arrange a recurring check-in call with your VA that fits your schedule. Suggestions: *Monday morning calls to discuss the coming up. *Friday afternoon calls to discuss tasks that are still pending and the week ahead. **Try to end every phone call with a task your VA can help you with right now.
2. Create recordings using Quicktime or your iPhone to train your VA on your favorite tools and process-oriented tasks quickly.
3. Set a deadline and priority level for every task: High/Medium/Low Priority; Due.
4. Always provide clear instructions and additional resources when helpful.
5. Give the relationship time to grow. Your VA is learning your workflow, temperament, tools, and business as fast as they can!
6. Feedback loops are a great way to ensure you and your VA are both understanding projects, tasks, deadlines, etc. Give feedback on their performance, and ask for feedback about how you can be a better communicator.



BEST PRACTICES

Scheduling:

Key Insight: Scheduling is perhaps the greatest time-sink in busy people's lives. Far too many hours and energy are spent when you're managing your own calendar. Offload this responsibility to your VA.

Step 1: Share edit access to your calendar with your VA.

Step 2: Begin to CC your VA on all emails that might result in a call or meeting. Let the other party know that your VA, cc'd, will help coordinate a time to connect.

Step 3: Your VA will take over the back and forth to coordinate a time that works for everyone. Finally, your VA will add the event and relevant details to your calendar.

Travel:

Key Insight: Travel preparations can be never-ending. Allow your VA to manage these tasks and help you fully enjoy traveling without the hassle of planning.

Step 1: Make sure your VA knows all of your travel preferences and has your frequent flyer numbers, loyalty accounts, etc.

Step 2: From the earliest stages of travel planning let your VA know: *Travel dates *Destination(s) *Preferred airline or hotel chain *Who you need to meet with. *Travel budget (if any)

Step 3: When you're sure about dates and plans, enlist your VA's help to complete all the necessary bookings.

Research:

Key Insight: You can always do more research. Get in the habit of offloading the preliminary steps.

Step 1: Ask and your VA shall find! Try to classify research into three categories: *Informational: "Please help me compile research on how to start an organic garden." *Comparative: "Please compare local painting services and provide a recommendation." *Data: "Please put together a list of the coworking spaces in my area with their hours and pricing."

Step 2: Identify what you'd like to learn from the research, how you'd like the information presented to you (Google Doc, email, etc.) and any specific steps you'd like your VA to take in collecting the research.

Reservations:

Key Insight: It's a matter of making sure things get done. Little things like making reservations in advance, or scheduling your regular dentist appointment, can go a long way in making sure life runs smoothly. Get your VA on the job.

Step 1: Make a list of all the regular appointments you'd like to have (yearly doctor's visit, monthly haircut) and have your VA maintain this schedule.

Step 2: For ad hoc appointments or reservations (or changes to existing ones) simply have your VA make the necessary changes.

At Fantail VA Services we pride ourselves on our professional approach and can do attitude.

Get in touch for a discovery call :

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I look forward to connecting with you soon

Di



Fantail VA Services

HELPING YOUR BUSINESS FLY