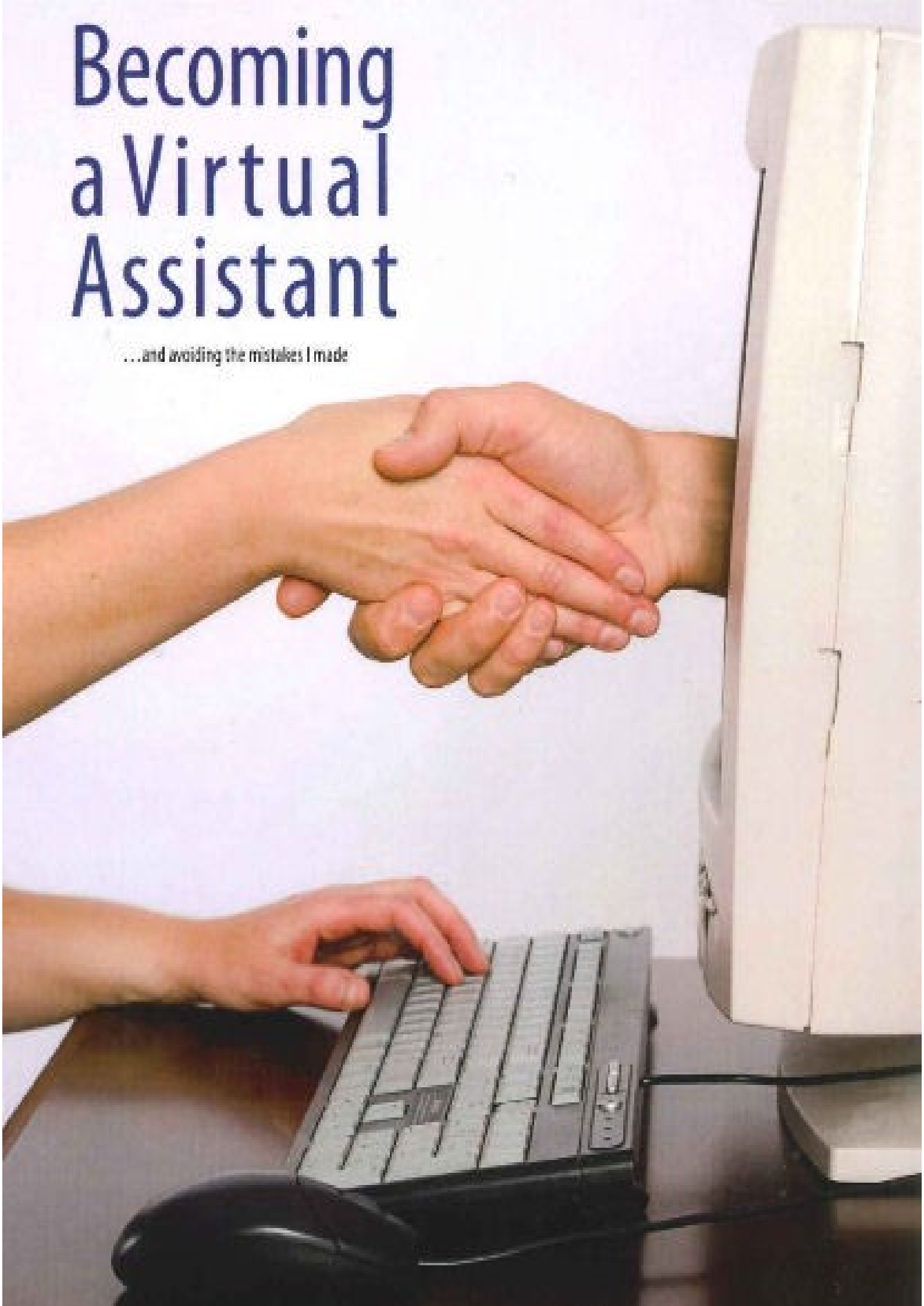


Becoming a Virtual Assistant

...and avoiding the mistakes I made



Becoming a Virtual Assistant

And avoiding the mistakes I made

By

Julie Farmer

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INTRODUCTION

My name is Julie Farmer and in 2002, I set up my own Virtual Assistant company in Oxfordshire, United Kingdom. Having started on my own, I now employ a number of people who work with me, and we cover a range of administrative and secretarial services for a wide variety of clients.



We are in a world of technology, and communication is the key to almost every business solution. It is now possible to talk to somebody via your computer who lives half way around the world, send files as email attachments, and even view and work on documents remotely.

The skills and services of a talented Virtual Assistant/PA are in high demand. A Virtual Assistant can work with anybody, anywhere, any time. This is a new way of working and an extremely fulfilling career.

I have written this book to give you an insight into this profession and share with you some of my experiences. My aim is to give you an idea of what it is like to be a Virtual Assistant and tell you what you need to know to start up as a Virtual Assistant yourself – this includes helping you to avoid the mistakes I have made.

A handwritten signature in dark ink, appearing to read 'Julie'.

Julie Farmer
myPA Business Ltd
April 2011

Section One

Choosing to be a Virtual Assistant

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WHAT IS A VIRTUAL ASSISTANT?

Having run a successful Virtual Assistant business for nearly ten years, I am frequently asked this question. I suppose the term is not familiar to everybody and it can sound like quite a strange concept. The question is usually closely followed by “why use a Virtual Assistant?” This first chapter explores both the concept of the Virtual Assistant and the reasons why people and businesses choose to employ one.

I would describe a Virtual Assistant (VA) as follows: someone who works for a small business or organisation, but is not directly employed by them, yet who has accountability for the work they do on their behalf. They are, in effect, a subcontractor who provides secretarial and/or administrative support.

The duties of a VA can include scheduling activities such as meetings, organising travel, social media, customer service, email campaigns, book-keeping and much more. A VA can work from their own office (they might, for example, rent office space in a shared building), from their home office, or from the offices of their clients. They can also do a combination of any of these.

The definition of a Virtual Assistant on the Wikipedia website is as follows:

“A Virtual Assistant (typically abbreviated to VA, also called a virtual office assistant) is an entrepreneur who provides professional administrative, technical, or creative (social) assistance to clients from a home office.... They usually work for other small businesses, brokers and consultancy groups. It is estimated that there are as few as 5,000-8,000 or as many as 25,000 Virtual Assistants worldwide; the profession is growing in centralised economies with "fly-in, fly-out" (FIFO) staffing practices.”

www.wikipedia.org

There is currently a debate in the industry about the title of a Virtual Assistant and whether ‘we’ as an industry should change it. The general feeling is that the title ‘Assistant’, to those who aren’t familiar with the industry, doesn’t give an accurate impression of the variety of roles a VA can fulfil.

I BELIEVE THERE ARE FOUR TYPES OF VIRTUAL ASSISTANTS:

Virtual Assistant (VA) – A VA is someone who has the ability to assist their client with a number of secretarial and administrative tasks, normally on a short-term project basis. Equally, they may undertake individual jobs over a period of time; for example, creating a database from business cards.

Virtual Personal Assistant (VPA) – A VPA is someone who works closely with a small business owner, providing secretarial and administrative support, and who is there for the long-term. The relationship could be seen as similar to that of employer and employee, but the VPA will only visit the client once or twice a week and despite the longevity of the relationship, is generally self-employed.

Virtual Executive Assistant (VEA) – A VEA is someone who works closely with a small business owner to provide secretarial and administrative support. They also get involved in some of the business development for the company. The VEA is an important part of the business, becoming one of the planners and authorising partners.

Personal Assistant – A PA is someone who generally works for one person in one organisation. However in the VA world, many VAs call themselves PAs as many employers/clients understand this term better.

For the purpose of this book I am going to use the term ‘Virtual Assistant’ (VA) to include all of the above.

WHY WOULD I WANT BE BECOME A VA?

There are many benefits to becoming a VA. One of the most exciting is that you become an entrepreneur... you are your own boss.

Let’s take a look at a few of the benefits that come along with that.

Flexibility As a VA, you can decide what hours you work as well as what jobs you want to undertake. If a job sounds interesting, great... do it. If not, you can pass and continue looking for something else. Some clients will want you to be available during very specific hours, while others will want you to be more project-based. As long as you complete the project in line with the agreed specification and deadline, you can work whatever hours you want. This provides an invaluable opportunity for working around the other demands of your life such as parenting or time-consuming hobbies. A word of caution: there is flexibility in being a VA but it has to work both ways. Your clients will often have tight deadlines to meet and adhere to. On occasion, you may have to fall in line and change your own plans in order to help your clients’ meet their deadlines.

Diversity As a VA, you can work for clients in your own town, your own county, or even around the world. You can have the diversity of working for one client, answering emails and scheduling speaking engagements and an hour later making sales calls for a mini bus hire company. It certainly keeps things fresh and interesting. If you find are not enjoying a job, you have the opportunity for change with the next work you take on.

Longevity You may get the opportunity to work for a client who would like you to become a long-term part of their team. They may be in the process of expanding their business and know that they have a fixed number of hours of administrative support needed each month. This can be a very rewarding contract, as you truly get involved in your client’s business. It is also great from the perspective of knowing you have some element of guaranteed income each month.

Work Environment Many VAs love the fact that they can work from a home office, which generally means in their own home. It is very convenient for parents who also have to take care of the needs of their family. Other VAs prefer going to an office to do their work. They find that the structure of working in an office environment is much better for their productivity. In some cases, you can even work from the client’s office. The choice is yours.

Pay You can set your pay scale. You decide the minimum amount you will work for, per hour or per job. If more in-depth knowledge and skills are needed for a particular job, you can ask for a higher rate. Most VAs operate as their own business, so you will need to keep in mind the tax

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implications and set your pay scale accordingly. We will talk more about the financial aspects of being a VA later in the book.

CHOOSING YOUR VA LOCATION

As I have mentioned, you get to make your own choice regarding where you work. You can even decide to change it from time to time. Let's take a look at some of the advantages and disadvantages when you are choosing your VA location.



- Working from Home
- Working from an Office
- Working from a Client's Office



Working from an Office

Some people prefer the psychological feeling of being 'at work', while keeping a clear boundary between home and their job. It is possible to rent office space in shared buildings, along with other small business owners.

Ultimately, the decision is yours; just make sure you really weigh the advantages and disadvantages for your particular situation. However, if you try it one way and don't

like it, you can change at a suitable point and try something else. You're in charge, remember.

WHO CAN BECOME A VA?

One of the wonderful things about becoming a VA is that you don't have to have a qualification, 'certificate' or specialised education. Generally, having experience in clerical and/or administrative tasks is all it takes to be a VA. We will cover more about what it takes to be a good VA – and there is a difference.

You will also need to make sure that you have the proper frame of mind to become a VA. Although the idea of flexibility sounds attractive, it does not suit everyone. Some people simply work better in a more structured environment. However, if you love the entrepreneurial aspect of working when and how you want, then you can be a VA.

SERVICES A VA CAN OFFER OR SPECIALISE IN

There are many different services or specialties that a VA can offer. While most VA work is clerical or administrative, here are some other options you can consider:

Social Media If you are familiar with Facebook, Twitter, Foursquare, LinkedIn, blogging and other types of social media, you can offer to manage a client's social media campaigns. While a client is running a business, they can struggle to find the time to post messages on their Facebook or Twitter account, or to check Foursquare. Once you get to know your client and their personality,

you can post messages on their behalf, as if you are them. If they are just starting out with social media, you can help them further by mapping out their entire campaign – when and what should be done on a daily or weekly basis to promote their business.

Mobile Marketing One of the newest forms of growing a business is through mobile marketing. As well as basic SMS/text messaging, mobile marketing involves a full array of marketing to mobile phones via Bluetooth, proximity systems and services linked to the web. The full range of mobile marketing is complex; however this can be used extremely effectively. If you know (or are willing to learn) how it all works, you will have a fabulous service to offer your clients.

Search Engine Optimisation (SEO) –This really is the nuts and bolts of growing an online business. A website is a great start, but if no one knows the website is there, it is a waste of your client's 'virtual real estate'. Knowing how to perform keyword research, submit to article directories and how to increase a client's rating on Google/LinkedIn search results is a valuable asset.

Website Design/Management and Blogging. If you can design and create a website, this is a skill which will stand you in good stead. 'WordPress' is becoming the new 'standard' in website design and management. It is relatively easy to understand and certain settings are free, for example, setting up a blog. However, if you want more functionality and control there is a small fee. If you are not familiar with it already, I suggest you go online and start to understand its functions and how it can be used by you and your clients. It is an easy platform to build a website on, and is simple to change and manipulate. Once you know one web design platform, you can learn others more easily. This is a really valuable service you can offer your clients. WordPress is just one tool for web design and blogging. It is worth getting to grips with a number of online website building tools, to see which you prefer.

Specialised Writing If you are adept at writing, make sure to let your clients know. Many clients can use a good copywriter to design flyers, brochures and pamphlets. If you have experience in a specialised area such as technical writing or sales letters, be sure to offer that as well.

Internet Research If you enjoy surfing the web and research information, offer your services as an internet researcher. It is common for businesses to need some research done, but often they don't require someone to be employed long term for this type of work. A VA is a perfect solution.

Postal Services A VA can do the shipping and other postal services necessary for a small business. Small business owners need to focus on working in their business, not on the administrative details such as postal services. As a VA, you can offer a necessary service that will save them time.

Database Management/Creation and Reporting This is another example of a VA being able to help a small business by alleviating some of the necessary but time-consuming workload. By creating and managing a database and handing over weekly reports to the business owner, you enable your client to focus on improving their business performance. They can focus on their business instead of in it and more importantly, this will help your client with a marketing strategy and sales planning as well as creating intellectual property for your client should he or she decide to sell their business.

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Typing Copy and Audio Many business owners use a small recording device to keep notes of ideas or projects. A VA can specialise in transcribing this audio copy into notes that the owner can review and put into action. This is also a great line of work for you to get into as your client can send you reports, quotes and so on, that need to be transcribed and sent out to their own clients. With your client's agreement, you can take on the full lifecycle of transcribing the copy, sending the documents out and ensuring that they have reached their destination (in effect creating an extended role from just audio typing).

Book-keeping This is another common specialisation of VAs. It is not necessary for most businesses to have a full-time book-keeper. A VA can cover the book-keeping of several different businesses during the month. You will need to understand accounting terms, the legal ramifications of company formations, regulations and tax liabilities.

ETHICS OF A VA

It is important to note that as you are working for a wide variety of clients, you will learn a vast amount of information about their company. You may work for a client that is a direct competitor of somebody you have worked for in the past, or currently work for. It is essential that you follow a strict code of ethics and never divulge one company's information to another, even if you think it could help them or 'may not hurt' the other company. Many companies will ask you to sign a Non-Disclosure Agreement (NDA) before working for them. In basic terms, this means that you agree not to share ANY information about their company with any other. Take this seriously. Even if you aren't required to sign an NDA it is always advisable to have your own.

Dress code One of the things that many VAs enjoy about being their own boss is that they can work from home, which in turn means wearing whatever they want. This could mean the joy of working in pyjamas or not having to wear make-up. My personal experience is that VAs who work from home, still get up and get ready for work by putting on clean clothes and doing their hair; they feel and act more professional throughout the day. You don't have to wear a suit, but at least put something on that you wouldn't be embarrassed to answer the door in.

When visiting a client you must ensure that you are dressed appropriately. If the normal rule of thumb is that your client wears a suit and their staff are dressed in appropriate attire, then you must follow suit. It would not be appropriate to turn up wearing jeans and a T-shirt when other members of staff are all wearing suits.



Regarding working from an office environment, I'd like to share a story with you:

When I began my business and before I had any clients, I made the decision that I wanted to get my business structure, ethos and internal procedures organised. As a result I gave little thought to my outward appearance and I would arrive at the office in jeans and a T-shirt or jumper, and trainers. I wanted to be comfortable, but I soon realised how crucial first impressions are - no matter what you are doing. I was pulled aside by another business owner, with whom I was sharing an office. She carefully mentioned that comments had been made regarding my appearance and that I always looked a bit disorganised.

The clothes I was wearing were not office attire. She suggested that as I was selling

office services I should dress appropriately. I had not considered this point until then as I was still in the planning stages, although I had already exhibited in Oxfordshire. I knew my fellow office tenants and understood they only wanted the best for me and my business. I took the comments on board and to this day I still get comments from them on the clothes that I wear. I am more aware of the impression my attire can give potential clients so always dress accordingly. I am telling you this as it is important to note that even after years of running my business, and having built up a reputation based on the quality of my work, people will still make decisions based on their initial appraisal of me. My image is a part of this. Remember that a person's first impression is imprinted in their mind. Decide what you want that impression to be.

Verbal language If you are working from home, don't get lazy. Make sure you are using proper language, and not falling into the habits of using slang. If you are working over the phone, it is important that you practice sharp enunciation, especially if you are working with clients in another country.

Also, practice having a 'smile' in your voice. You will be amazed at how much of an impression this can make on your clients. They want someone who is professional, cheerful and enthusiastic, especially if they are expecting you to represent them while interacting with their clients.

Body language You may think it sounds silly, but your body language can be 'heard' over the phone. Sit up straight, and your professionalism will shine through. If you are in an office, body language becomes even more important. Remember my story about first impressions. If someone 'sees' you rolling your eyes when you are talking on the phone, the impression will be that you really don't care.

The bottom line is, no matter where you are working – at home, at an office or at your client's office, keep an ethical and professional manner at all times.

WHY CLIENTS USE A VA

The most common reasons a client will be looking for a VA to work with them are:

Non-core business needs Small business owners want to concentrate on the core of their business – for example, a freelance surveyor will want to be carrying out surveys and meeting potential new clients. To have somebody to take on the more day-to-day aspects of their business, or areas which they are not experienced in, allows them to concentrate on what they do best.

Resources A small business does not have the need or resources for a permanent administrator or secretarial role, so using a VA enables them to employ someone for ad hoc projects, or regular tasks, as and when they are required.

Skill-base There may be an ad hoc requirement for a specialised service such as creating a CRM system, and your client does not have the skill or resource within their business to complete the project.

Convenience and time-saving Having a service which is accessible within a short timescale, and often performed by somebody who you already know (and who already knows your business) is extremely convenient and saves a client the time of having to source and train a part-time,

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temporary, or even casual employee. It also saves on the associated red tape which comes with recruiting somebody to join a business. These benefits should not be underestimated.

Not wanting to do the task themselves Sometimes people have a real aversion to certain types of work. If you have a client who hates administrative tasks such as letter merges, postal campaigns and so on, then you need to let them know how easy it would be for you to do it all on their behalf. If it gets them out of a task they hate and frees up their time to do something they actually want to do, they will soon realise your value.

Not spending enough time with their family This is a common problem for small business owners, as businesses are time-consuming and many people are so passionate about what they do that their family time can get eroded away without them even realising it. Using a VA for certain tasks can alleviate some of the pressure and workload and enable clients to create more of a balance between these two important areas of their life.

Outsourcing is cost-effective A VA is easier than recruiting a new member of staff and the client will not have to comply with employment law. They will not have to worry about sick pay, about holiday pay or cover. They will not have the worry of finding extra space in their office, buying extra computer equipment or licences. There will also be no need to provide for Pension cover or Health care costs.

Other tasks taking their time Up Sometimes there simply is not enough time in the day to undertake all the tasks a business needs to cover, in which case a VA is once more invaluable, as their services can be employed for specific aspects of a job – or for keeping the day-to-day business going – in order for a client to complete an important project.

WHAT A CLIENT WILL BE LOOKING FOR IN A VA

Although as a VA, a client will not expect you to go through the same application process as if you were applying for a job as their direct employee, they will still want to vet you and be sure of your skills, reliability, professionalism and so on.

A good idea is to have some testimonials/references available from previous clients. If this is difficult because you are just starting up, try to obtain references from previous employers, and a personal reference from a professional acquaintance.

The attributes which a potential client could be looking for are:

Professionalism Illustrate this through personal appearance, language and well-presented business literature. Although you work for yourself, you still need to be someone that other people would want working for them.

Personality Potential clients will want to know they can work with you, so try to strike a balance of friendly and formal; without being too formal. You need to be approachable.

Skills/experience/qualifications You should always provide a copy of your CV which will show your roles prior to becoming a VA as well as examples of work undertaken since setting up on your own. Offer copies of certificates where appropriate.

Reliability If you say you will call a client at a certain time, be prompt. Respond to their emails within a given timeframe. References from other clients would also be useful here.

Communication Overlapping all aspects of how you conduct your business, effective communication is essential when presenting yourself to potential clients. You need to ensure your client is confident of your communication skills whether face-to-face, in writing or just generally throughout jobs. Offer regular updates (not too often – you can agree the timings with the client based on a particular job) so that they know you are still there, and still working for them as the job or project progresses.

Honesty This is hugely important and will only really become apparent once you are working for someone. From the outset, you need to be honest about the length of time that you think a job will take and any costs involved. Again, testimonials/references would be useful to vouch for you, but it can also be fairly easy to spot if someone is not being completely honest. There is no point in ‘stretching the truth’ to get work. You will feel stressed, you will be found out, and you will create a bad reputation for yourself.

The key thing a client is looking for in a VA is somebody to ease their workload and their mind. You need to create confidence in a client so they can let you get on with the work required. They need to get on with their job, without having to watch over you or keep chasing you for updates.

If you can present the right initial impression and then carry out the job(s) required as promised, you will begin to build a strong and fruitful relationship which will benefit both you and your client.



Section **Five**

Conclusion

CONCLUSION

In conclusion, I would like to say that I have run my Virtual Assistant business since 2002. It has been one of the best career decisions I have ever made. I thoroughly enjoy meeting my clients.

Since 2002 I have discovered that there are many differences to running different businesses. I have learnt how a sculpture is made in bronze, resin and a combination of the two, I have learnt how to prepare for a speech in front of 2000 people, I have learnt how to organise a membership networking group and how to run a plumbing business. What I have also learnt is that each business owner has their strengths and weaknesses and it has been one of my roles and honour to help support the weaknesses.

I have also learnt how my business works, what my strengths are and where I needed to learn more. I have learnt how to employ staff and how to look after my business.

I love this industry and I hope that you will love it as much as I do. You can never guarantee what you will be doing from one day to the next, you can never guarantee who will walk into your office and ask for help and support.

I would like to wish you good luck in running your Virtual Assistant business and I hope that you will enjoy running your business as much as I have enjoyed your business.

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