

Ready to take the plunge and hire remote help?



Learn how to onboard a new VA

Practical tips and strategies to help you bring a skilled virtual assistant into your team as quickly, efficiently and effectively as possible to drive growth and support your business goals.

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BUSINESS SOLUTIONS

Getting to grips with the important stuff

There are so many benefits to hiring a virtual assistant or a Virtual Business Manager - not least that he or she will free up your time so you can work on your business, not just in it!

But to make sure the onboarding process runs smoothly, there are certain things you need to bear in mind when hiring a remote worker.



First thing's first - what do you need a VA for?

Before you can even think about hiring a virtual assistant, you need to decide which jobs and processes you want to give to somebody else.

Time is money for every business owner - so it makes sense to outsource the tasks that eat into your working day but do not provide you with a justifiable return on investment (ROI).

In other words, to get the most from your new working arrangement, you need to make sure your VA is taking comparatively low value tasks off your desk and freeing up your time so you can concentrate on high value and/or high income tasks instead.

You should also outsource the things that you lack the knowledge and skills to do properly. For example, if you struggle to stay on top of your accounts, you should find a VA with experience in bookkeeping or credit control. He or she will be able to complete the work much faster and much more accurately than you - and you won't need to worry about factoring unenjoyable work into your week!

Ad hoc working vs a regular retainer

If you only require a virtual assistant for a short period of time – eg, for a one-off project – it may make sense to enter into an ad hoc arrangement. This involves booking a VA for a set price, without any kind of long-term commitment.

If you think you would benefit from X number of hours per week or month, choose a retainer package instead. Under this kind of agreement, your VA will make sure they set aside enough time in their schedule to complete your tasks. They may also offer you a more competitive rate for batch-booking.

Regardless of whether you sign up for ad hoc work or a monthly retainer, all costs should be clear and transparent at the start of the process. If you have any concerns about your VA's fees or billing procedures, speak up before you sign on the dotted line!

How to find – and hire – the right VA

Once you have identified which tasks need to be outsourced, you need to start searching for a VA who has the skills and experience to complete the work to a high standard.

Approach the recruitment process as you would if you were employing a permanent member of staff. Create a job description, outline the skills you're looking for, specify your "salary" (aka, your budget), and start advertising. There are many websites with VA job boards, including industry favourites PriorityVA.com and VirtualStaffFinder.com. However, we would always recommend asking for suggestions from your business network before sharing your vacancy with the wider community. A colleague or contact of yours may have experience of working with a particular VA or VA agency with a great track record.

Be sure to interview and screen VAs as thoroughly as you would a full-time employee. If you want to get a feel for their work before you make a decision, ask them to complete a trial task (but don't expect them to do this work for free).



Setting objectives and KPIs

Think about what your aims are for your business, and how working with a VA will help you achieve these goals. Then, put together a strategy that makes the best use of your VA's skills, so you have the best possible chance of meeting your Key Performance Indicators (KPIs).

For example, if your goal is to increase your annual revenue by 30%, think about how you can delegate work to your VA to free up your time for those all-important high-earning tasks, as we discussed earlier.

Or, if your objective is to arrange five prospect meetings per month, consider instructing your VA to spend their time cold calling, cold emailing, connecting with potential customers on social media or networking on your behalf to generate more leads for your business.

Adopting an 'outcome' mentality

To get the best value from your partnership, it makes sense to outsource outcomes, not specific tasks. This way, instead of asking your VA to follow set processes and work to specific hours - which can lead them to adopt a kind of checklist approach to their tasks - you will be giving them the freedom to own how and when they work and encourage them to find their own way to meet their targets.

But whichever way you choose to work, you must outline your objectives - and, specifically, your KPIs - from day one. Doing so will ensure your VA fully understands what is expected of them - plus, it enables you to accurately monitor their progress.

Agreeing on communication channels

Are you a fan of old-fashioned phone calls? Or would you prefer your VA to contact you via email or WhatsApp so you can respond when you can give them your full attention?

Let your virtual assistant know how you would like to be contacted – and how frequently you expect them to check in with you, too.

Regular communication is so important when you are working with somebody remotely. We would always recommend touching base with your VA over the phone or via a conferencing call at least once a week to make sure they are on track to meet your outcomes. A proper one-to-one will give them the opportunity to ask any questions or air any concerns (and, on a personal level, it will make them feel like a valued member of your team).



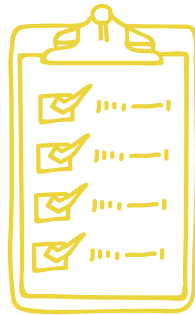
Discussing boundaries and expectations

It may feel a little formal – but making your expectations known from the very start of the arrangement is the key to establishing a great rapport with your VA.


If you're the kind of person who wants to switch off at 5pm on a Friday and not even think about work again until first thing Monday morning, make sure your chosen VA is aware of this. Tell them not to contact you out of working hours to save any resentment or frustration.

Similarly, if you expect your assistant to be available around the clock to jump on your ideas as they come to you – including in the evenings and at weekends – make it known from the outset that you're looking for somebody who is willing to work on a more flexible basis..


The onboarding process: your checklist



Agree a retainer or ad hoc rate


Talk to your VA in the first instance to work out which kind of agreement best suits your requirements. Remember, you may be able to access a more competitive hourly rate if you commit to a retainer instead of paying for work on an ad hoc basis. 

Settle on an hourly rate for any additional or emergency work that may crop up

Scope creep is common, especially if a project takes longer than expected or you're faced with unforeseen challenges. Be sure to ask your VA what they would charge to cover additional work or any last-minute extras. 

Agree payment terms and the preferred payment method

Whether working under a retainer or towards a one-off project, most VAs will bill you once the work has been completed. Some may choose to invoice you for a percentage of the total fee upfront, as a means of security.

Find out whether your VA would prefer payment by BACs or card. (Nowadays, it's very rare for any business to accept payment via cash or cheque.) Ask them for their invoicing terms, too. Most will expect payment within 30 days. 

Choose your time tracking system

There are plenty of timesheet apps out there that enable you to see how much time your VA is spending on your business tasks (and make sure your project doesn't go over budget). Popular tools include Clockify, Toggl and Harvest.

Some CRM and sales management systems also offer time tracking features.



Set up your VA with an email address on your own domain

It's a simple way to make sure all business correspondence stays in the same inbox - and if your VA needs to contact prospects or clients, it will appear as though their email is coming directly from your company.



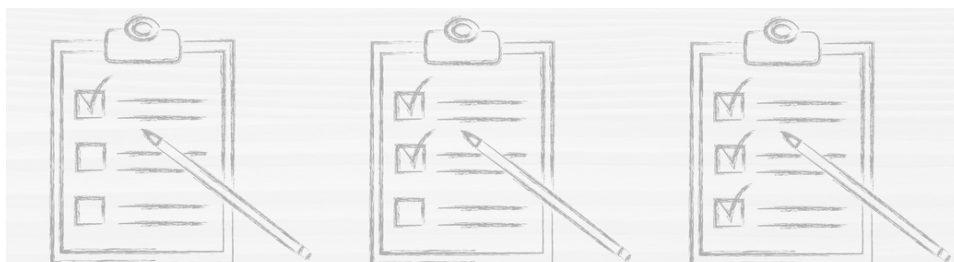
Provide access to the right equipment

Most VAs will already have the hardware they need to do their job. In most cases, they will only need a laptop and a phone! But if your work requires specific or specialist equipment, make sure your assistant receives it in time for their start date.




Provide access to all the necessary software

This includes anything that's used widely within your business - like Microsoft Office, Zoom and/or Skype - and more niche tools like Canva and PDF Pro. Where possible, you should also provide your VA with the means to back up their work, so they will be able to recover company data if you suffer an outage or a malicious attack.




Check your VA has suitable insurance

You will not be responsible for arranging professional indemnity insurance, public liability insurance and/or legal expenses cover for your VA. Remote workers are essentially self-employed, so the onus is on them to make sure they are covered for the work they do (not just for you, but for their entire client portfolio).

Always ask to see your VA's insurance certificate before you instruct them. If they don't have cover in place, point them in the direction of Policybee, which now offers tailored policies for virtual assistants. 


Create training documents or schedule tutorials

Before you can start passing work to your VA, you'll need to train them in your systems and processes, and introduce them to the software your teams use on a daily basis.

Often, the most efficient way to do this is to produce training manuals or videos that the individual can refer to as and when they need to. You could also offer to train them up via Zoom or Skype or arrange a face-to-face session if you feel they will benefit from more intensive one-to-one training time. 

Schedule in regular performance reviews

We mentioned earlier that clear and regular communication is the key to any successful relationship with your VA. By the same token, regular performance reviews can not only help to keep projects and outcomes on track – they can also strengthen your working relationship.

Refer back to your KPIs during each performance review. If your VA is consistently achieving their targets, let them know what a great job they're doing, and how pleased you are with their work. If they're not quite hitting the mark, try to get to the bottom of the challenges they are facing, and ask them what they feel they need from you in order to perform better. 

And finally - treat your VA like a member of your team!

Your VA may be working remotely, but that doesn't mean that he or she should feel any less valued than the rest of your staff. Make an effort to include your virtual assistant in team building exercises and other social events, and encourage interaction with the rest of your employees wherever you can.

What if your VA doesn't meet your expectations?

If this happens:

- Ask your VA to clarify where the issue lies. Have they been given everything they need to deliver quality, accurate work? Have they been encountering technical problems that have prevented them from delivering work on time? Are they grappling with slow responses from other team members? There could be a genuine reason for their lack of responsiveness or their inability to meet your deadlines.
- Once the situation has been resolved, reiterate the need for open and transparent communication. Make it clear it's OK for your VA to ask questions or request more information if they need it (and be prepared to respond to their requests in good time).

If the problems continue:

- Keep a paper trail of all correspondence so you both have a record of the tasks that have been set, the deadlines that have been put in place, and the expectations you have of your VA. If, after a few weeks or months, it becomes clear that your VA is consistently dropping the ball and is not delivering on your KPIs, you should consider starting a more formal disciplinary procedure.



Ready to work with a VA?

Contact Rachel at Genie today.



Genie is owned by Rachel Gay, a highly experienced virtual assistant and Virtual Business Manager who exited a career as senior manager in the transport and logistics industry to focus on delivering flexible, reliable and affordable support solutions to growing businesses on an outsourced basis.

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Standard Opening Hours:

Monday to Friday: 9am - 5pm

Saturday and Sunday: Closed

Out of hours appointments are available by request.

The logo features the word "genie" in a lowercase, grey, serif font. A yellow question mark is positioned above the letter "i". Below "genie", the words "BUSINESS SOLUTIONS" are written in a smaller, yellow, uppercase, sans-serif font.