

# 101 Ways To Use A Virtual Office Assistant

## Bookkeeping

~> You need to pay your bills. You mail or fax them to the VA. The VA sets up a checking account with payment authorization (or online bill payment services) for both of you. The VA prepares the payments and enters them into accounting software that you can also view from your own computer. The VA notifies you how much money to deposit into the account and pays the bills, or mails them back to you for signature and mailing.

~> You need to keep track of your accounts payable and receivable. As bills are paid, the VA enters the transactions into accounting software, reconciles bank statements, enters credit card transactions, prepares invoices, makes and/or enters deposits, and prepares end of month reports.

~> You need to invoice your clients. You send an email to the VA with the number of hours to be billed to each client. The VA prepares and mails the invoices.

~> Your association needs annual dues renewed. The VA prepares the invoices, mails them according to schedule, receives payments, and deposits them into the association's account. All transactions are recorded in accounting software and sent to the association via email (zipped file), FTP transfer or diskette/CD.

~> You have account receivables that are past due. The VA mails past due notices and follows up via telephone to collect on past due invoices.

~> You prefer to pay your own bills, but need monthly bank reconciliation. You mail the VA a copy of your check register and bank statement; the VA enters data into accounting software and reconciles the account. The accounting software report is sent back to you via zipped email attachment.

~> You prefer to pay your own bills, but need reminders to pay in a timely manner. The VA reminds you by email or telephone when due dates arrive.

## Secretarial and Telephone Services

- ~> You need to confirm weekly sales appointments. You fax your list to the VA, who calls the appointments, notes who is confirmed and who must be rescheduled, and faxes the list back to you.
- ~> You need directions to a prospect's office. The VA calls, gets directions, and emails them to you.
- ~> You have routine paperwork to be filled out on a daily basis (e.g., sales call re-caps). You call the VA with the information, who fills out the form and faxes it to you.
- ~> You have stacks of random paper documents on your desk that you can't figure out how to organize. You mail them in a big envelope to the VA, who breaks them down into labeled manila folders, creates a master list, and sends them back for you to place in your file cabinet, category list in front.
- ~> You want to make sure you have a backup of your computer or a special file. You mail or e-mail it to the VA for safekeeping. In the event of a disaster, your files are located off premises.
- ~> You travel frequently. The VA coordinates your air travel, car rental and hotel reservations.
- ~> You're going on vacation, or are frequently out of the office, but need to stay in touch with important business calls and not leave the phone unattended. When you're unable to check your voice mail on a regular basis, you use call forwarding feature to transfer calls to the VA, or record on your voice mail that callers with urgent messages may contact your assistant. The VA answers calls, responds to routine requests, and contacts you with urgent messages. Or you check your voice mail yourself and answer some calls personally while assigning others to the VA. Or you obtain a separate phone line in the VA's office so that a live human voice will answer with your company's name.

## Writing, Editing & Proofreading

- ~> You're preparing a brochure, website or manual and need assistance with the copy. The VA creates, edits, formats and/or proofreads drafts as you go along.

## Graphical Presentation

- ~> You're preparing a seminar and need a PowerPoint presentation. You fax sketches of diagrams and charts to the VA, who prepares the PowerPoint slides and sends the document to back via email attachment.

## Database Management & Data Processing

~> You fax the VA copies of business cards you've gathered at a presentation or during the course of the month. The VA enters the information into a contact database, uses mail merge to produce a follow-up letter and either scans your signature, uses a signature font to sign your name, or mails them to you to sign, and sends out the letters.

~> You email new prospect leads to the VA, who enters them into a contact database and uses a personalized mail merge to send an introductory letter. The VA monitors the marketing follow-up program, sending a pre-determined marketing piece every two weeks. Each week the data is sent to you via email so you have a record of the transactions. The prospect responds directly to you.

~> You fax your clients' new policy information to the VA, who enters the information into a database and sends it to you via an email attachment. The VA then prepares and mails a standard confirmation letter to the policy owner, tracking the annual expiration date of the policy and, on the due date, sends a reminder email to you.

~> You want to send a direct mailing or fax broadcast and need to verify your prospects, some of which have missing fax numbers. You send your prospect list to the VA via email attachment. The VA telephones each name, verifies spelling, title and address, obtains missing fax numbers, makes corrections, and returns the list to you via email attachment.

~> You need to change database software. The VA converts the data and walks you through installing and learning how to use the new software.

## Word Processing

~> You take notes at meetings and need them typed. You mail or fax the notes to the VA, who types them and mails, faxes, or emails them back.

~> You need to send a series of letters. You fax handwritten drafts or dictate over the phone to the VA, who types the letters, faxes or emails them to you for approval, prints them on your stationery, and mails them.

~> You need a manual typed. You mail a compilation of old documents with handwritten corrections to the VA, who consolidates them, types them up and emails, or sends a diskette or CD, to you.

## Desktop Publishing

~> You need business cards or a tri-fold brochure. The VA designs and prints them for you, using pre-designed paper stock, clip art, or your own logo, either in conjunction with a printing service or printing them for you in small amounts on an as-needed basis so that you can update their content whenever appropriate.

~> You need a price list, product list, or schedule prepared. The VA designs, types and prepares flyers, calendars, and lists using a color printer and clip art or your own design.

~> You need certificates for participants completing a seminar, getting an award, or becoming a member of your organization. You fax a list to the VA, who designs and prints certificates, including seals and ribbons. The VA sends the completed certificates to you to issue or mails them directly to each participant.

~> You want to publish a quarterly newsletter. You provide the content and the mailing list to the VA, or the VA helps with articles. The VA typesets and prepares the newsletter, prepares labels, and mails.

~> You want to distribute CDs as part of a mailing and want your company logo on the labels. The VA designs and prints labels using art you provided, attaches the labels and coordinates the mailing.

## Research

~> You sell business success tools and seminars. The VA researches a target industry, prepares a list of companies, calls to identify a contact individual, then prepares and mails introductory material. After a specified time, the VA calls to verify information has been received and to schedule a sales call.

~> You need a hotel conference room for a seminar. The VA contacts several hotels in the area to find availability of the date, size, and specifics of the seminar, obtaining written quotes from the hotels that can accommodate the request, compiling a comparison and reporting the findings to you.

~> You need CDs duplicated. The VA calls several vendors and obtains written quotes. Upon approval, the VA sends the original CD to the vendor, designs and prints labels, receives the completed order, attaches the labels and sends the package you.

~> You're interested who your competition are and what they're doing. The VA does a search online and compiles a list of the appropriate websites for you to look at.

~> You're considering adding to your advertising. The VA contacts possible advertising resources from the Internet, magazines, periodicals, newspapers, etc. and acquires information on pricing, publishing dates, publishing deadlines, payment policies, etc. Information is compiled into a report for you to review.

## Mail & Email Services

~> You want to fully utilize your email software program (e.g., filters, auto-reply, signatures). The VA walks you through how to set this up and teaches you how to use it.

~> You travel frequently, usually returning to a stack of mail, sometimes missing important correspondence. You have your mail forwarded to a post office box near the VA, who retrieves and reviews the mail, faxes or overnights to your hotel urgent items, responds to routine matters, and forwards items to your office that can wait for your return. To save on postage costs, some items may be scanned and delivered via email attachment.

~> You need fulfillment services for books, tapes or other materials. As orders come in, you email or fax the VA with the information, or the VA collects the information from your website, then prepares packages and mails.

~> You can't keep up with your volume of email and are missing important messages. The VA sets up a general email account for you, such as [info@mycompany.com](mailto:info@mycompany.com), then retrieves email, sorts, responds to routine requests, and forwards items of importance to you at your personal email account (myname@mycompany.com).

~> You're going on vacation and don't want to miss important messages. The VA downloads your email, or you forward your email to the VA. The VA notifies individuals that you're out of the office, contacting you with urgent messages.

~> You want a way to automatically respond to standard requests to your website. The VA creates an auto responder, monitoring and establishing a database of who, and how many, are requesting information.

## Marketing Support

~> The VA helps you implement a marketing plan, submitting ads by deadline, tracking expiration dates, coordinating payment, and handling correspondence with advertising vendors, continually updating the advertising report and/or advertising budget report for your review.

~> You issue a variety of sales brochures. You (or the VA) mail postcards using the VA's contact info as the return address and fax number. The VA mails the appropriate brochure upon receipt of request, updating your database with name, address, date and type of brochure requested.

~> You want to monitor customer satisfaction. The VA creates a customer feedback questionnaire, mails to customers, receives the completed questionnaire, summarizes the responses and issues you a report.

## Transcription

~> You need a telephone conversation (e.g., conference call, tele-class) recorded. The VA records the call and transcribes the tape for the participants.

~> You dictate letters and memos on a cassette tape, or interview a subject, and mail the cassette to the VA via overnight delivery. The VA transcribes the tape, prints the letters on your stationery and mails the following day, or emails you a copy of the verbatim interview.

## Web Site & Related Internet Services

~> You need a web presence but can't justify spending thousands of dollars to use a high-end web design company. A VA who is skilled in HTML software can design, build, and maintain a professional website for you and save you hundreds, if not thousands, of dollars.

~> You need changes on your website. The VA edits or uploads new information to your website, whether the site was created by the VA or by someone else.

~> You need to promote your website. The VA submits the URL, key words and description to various search engines on a routine basis.

~> You want to improve your website traffic with related links. The VA contacts similar websites and requests mutual link exchange.

~> You don't have time to monitor your website for errors or broken links. The VA periodically reviews the website and verifies links.

~> You don't have time to monitor website traffic. The VA monitors traffic reports and makes recommendations for adjustments to improve traffic.

~> You send out an email mailing list/newsletter and some bounce, due to incorrect subscription requests or other email failures. You forward related messages to the VA, who correctly processes the requests to subscribe, unsubscribe or delete bounced messages. The VA manages the email database, adding subscriptions, deleting those wanting to unsubscribe, and posting announcements to the list.

~> You want to increase the number of subscribers to your electronic newsletter. The VA lists the newsletter with a variety of online directories, contacts other subject-related list owners to inquire about mutual cross-promotion, and follows up to make sure the listings are accurate.

~> You want to promote your company online. The VA writes articles on your behalf, or submits articles written by you, to electronic newsletters.

## Purchasing & Supply Procurement

~> The VA sets up an online account on your behalf with your suppliers. The VA works with you or your accountant to set up lines of credit with vendors and monitors keeping the credit information current and accurate.

~> On a pre-specified basis, the VA faxes you a list of office supplies that you use on a regular basis. You check off what is needed and fax back to the VA, who re-orders the supplies and has them delivered directly to you.

~> You need to purchase new software, office equipment, or a specialized product. The VA researches makes, models and versions, using both the Internet and inquiries to business networking groups. The VA calls several vendors, obtains pricing information, ascertains that the product meets your requirements, and reports the findings to you. The VA then purchases the item on your behalf. If the item requires on-site setup, the VA makes those arrangements as well as confirming with dates/times and travel information.

## Personnel & Human Resources

~> You're looking to hire an employee. The VA writes a help-wanted advertisement, places the ad, receives and reviews the resumes, conducts the initial phone interview, narrows the selection to three individuals, and schedules an interview with you.

~> You fax employment applications to the VA, who verifies past employment, calls the references, and reports the findings to you.

~> When a new employee is due to arrive, the VA prepares and sends a welcome package.

~> You need a reminder to provide annual performance reviews for your employee(s). The VA tracks the dates and sends you a reminder.

~> You need assistance with payroll requirements. The VA verifies that all payroll requirements have been met, appropriate taxes paid and forms filed.

~> You want to make a career change. The VA prepares or updates a resume and cover letter for you, researches job openings, and submits resumes to potential employers, tailoring each to the particular employer. After an interview, the VA promptly mails out a thank-you follow-up letter to the potential employer.

## Real Estate Assistance

~> You have a motivated seller and want to emphasize that you're organized, professional, and committed to their needs. The VA prepares a pre-listing/pre-sale package, including your resume of past sales; client testimonials; advice about pricing, selling time and staging; and other important questions to think about. You send the VA the seller's contact info and the VA prints and sends the package. This can both give you an advantage for listing appointments and decrease the length of appointments.

~> You spend too much time scheduling showings and reporting to clients, with many phone calls back and forth. The VA keeps in touch with clients and does your scheduling for you, using a calendar you can both access online with the touch of a button.

~> You need a flyer designed for your newest listing. You e-mail the VA room descriptions and photos. Skilled in programs such as Publisher and Real Estate Assistant, the VA enhances the photos and writes the text to romance the listing. The VA then e-mails the flyer to your list of buyers and interested agents.

~> You send the VA new listings, changes to current listings, price reductions, etc. The VA enters them into the MLS and your potential clients are e-mailed about the updates.

~> You hope clients find your website—and keep coming back. The VA knowledgeable about Search Engine Optimization gets you well positioned within search engines, makes updates on a regular basis to keep your website from getting “stale,” and checks regularly for broken links.

~> You need an edge over other real estate professionals who don't yet provide virtual tours of their properties. The VA arranges panoramic visual tours of your homes for sale or creates a dynamic Web commercial using your still photos.

~> You'd like to show an attractive listing presentation to your potential clients. The VA skilled in using multimedia software creates a presentation that you can show from your computer and creates a CD you can leave with your clients.

~> You want to thank those who have referred you clients and make sure your name stays at the top of their minds. The VA creates attractive thank-you notes and birthday cards and sends them out on your behalf. The VA also helps you choose and send custom closing gifts