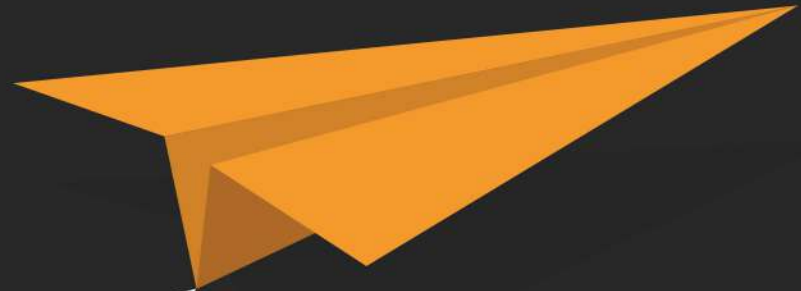




VA LAUNCH GUIDE

*For Your
Marketing
Virtual Assistant*



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A virtual assistant (VA) can be an integral member of your team. Guarantee your VA'S success with our easy-to-follow *VA Launch Guide*.

Learn how to maximize your own MyOutDesk Virtual Assistant.

A large orange triangle pointing downwards from the top right corner of the page, creating a diagonal design element.

This *VA Launch Guide* contains essential items that have been carefully prepared through a collection of effective strategies, implemented by our top clients and VAs, with years of experience.

MyOutDesk takes pride in our stringent selection, training and placement processes to ensure a perfect fit between our clients and VAs to guarantee a smooth transition and maximum benefits for both parties.

Visit www.MyOutDesk.com and learn more about MyOutDesk Virtual Assistants.



90-Day Launch Plan

Day 1-30

TRAINING

Neuroscientists and psychologists proved that it takes about **90 days** to solidify a habit. The same goes for a virtual assistant — for successful adoption, allow an adjustment period and repeat key messages regarding the change intentionally and consistently.

From Day 1-30, training will include the basics such as: market overview, company mission & values, and individual team introductions.

This period is also a great time to set expectations and introduce your new virtual assistant to your office culture.

It is highly recommended that you include roleplay and shadowing sessions with your virtual assistant.

Shadowing will give your virtual assistant a chance to experience what tasks will be like first-hand.

Videos and materials for study and review should be provided as well.

MILESTONE TASKS

During this period, your virtual assistant should be included in your team meetings.

Get your virtual assistant familiar with your software, systems, tools, and applications that you use. Create and complete a to-do list. These tasks are important and every effort must be exerted to complete them as they will serve as the foundation for your virtual assistant.

Further reading material and videos to supplement their learning should be provided as well.

Familiarize your virtual assistant to your social media practices and editorial workflows so that the VA can begin an early draft of an effective content strategy plan or an [agile project management](#) system.

Push and set a small goal at this point. For smarketing VAs, have them audit all your social media and establish appropriate role privileges to begin publishing posts whole learning your brand and voice.



90-Day Launch Plan

Day 31-60

TRAINING

During this period, training should include: keeping up to date on status reports and analytics data; videos or support on key tasks like social media, content production, and scripts; and further systems & procedural training with your best practices.

At this stage, your virtual assistant has enough familiarization with business, systems and tools to start expanding tasks.

Continued roleplay is also highly recommended. For your marketing VA, doing a analysis on competitor's marketing activities may give an added boost.

Shadowing may be continued as well at your discretion.

Get to know your virtual assistant like you would for any other person on the team.

Find out who they are, what their dreams are for their career, and the future life they would like to create. As cliché as it may sound—when you show your heart, employees will give their heart to the company.

MILESTONE TASKS

At this point time-blocking should be administered and practiced. A thorough understanding of your processes should be established.

Your virtual assistant's knowledge and grasp of the market, trends and benefits of different areas should be above average.

For marketing VAs, mastery of producing an editorial calendar is a necessity. Your virtual assistant should be able to coordinate the production of most common types of social media copy with ease.

Virtual assistants must begin to show expertise on your systems after going through your first month of training and immersion.

It is recommended to set a goal of completing 10 unique key deliverables, primarily on important documentation of [standard operating procedures](#) for various departmental functions.

At this point, [procedures and productivity tracking](#) sheets should be set and in use. Create procedures that reaches your set goals and outcomes.



90-Day Launch Plan

Day 61-90

TRAINING

Again, continuous updates on current market market, affairs and trends should be learned.

Training on all your systems should be established as well as continuous CRM platform training using videos and other source materials. Expand your virtual assistants tasks and role as necessary.

Roleplay should consist of practicing scripts and a daily session with other lead coordinators or agents.

At this point, your virtual assistant has begun moving from novice to expert.

With your virtual assistant in place and fine-tuned you are going to be staring down more free time than you know what to do with. Obviously the first thing you'll do is turn your attention to high-value prospects and new projects.

See what new projects you can assign your virtual assistant based on their individual talents and characteristics.

MILESTONE TASKS

Continued practice of time-blocking should be in motion. At this point, your virtual assistant is well-equipped with knowledge and has enough skill and experience to tackle tasks head on.

Your marketing virtual assistant should be able to handle email and social media campaigns confidently; plus get even more in tune with your goals and objectives.

Your virtual assistants will require less supervision and are adept with your routine, communications tools, CRM, and other applications.

We recommend setting a goal of creating editorial calendars and workflow task management systems for various daily functions.



90-Day Launch Plan

ACCOUNTABILITY AND COACHING

MyOutDesk recommends having at least bi-monthly meetings, regular one-on-one sessions and constant communication with your virtual assistant. This are the keys to success throughout this 90-Day Launch Plan.

Invest your time in not just training, but truly implanting your virtual assistant within your team and business assures mutual success and growth.

Every MyOutDesk client is assigned a success coach, who can answer your questions, address your concerns and provide additional support to you and your virtual assistant.

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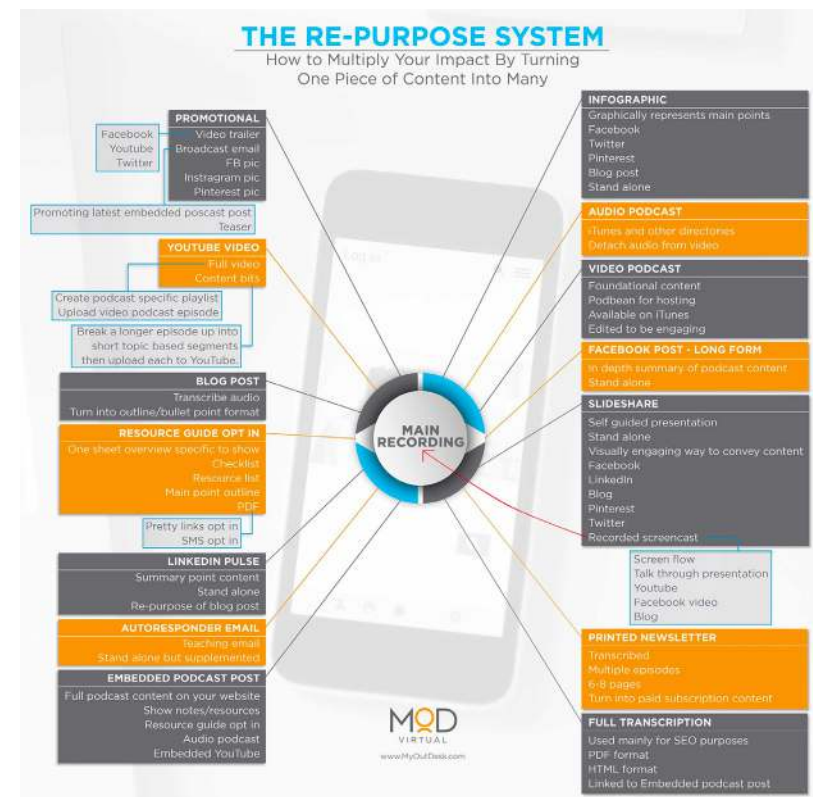
Marketing Toolkit

The Re-Purpose System

One virtual marketing coordinator role that will benefit your business is repurposing content.

When you create a blog post, for example, and put it on your website, you can have someone repurpose that content and multiply its effect. You can tweet about it. You can put it on LinkedIn. You can send video content to YouTube.

There are so many ways your unique content can be proliferated out in the world when you have someone to do that cyber-legwork for you. If there is a call to action to schedule a consultation, to subscribe to a newsletter, to get more information, to download something, or to do whatever your lead-gathering strategy might be, your marketing coordinator can put more eyes on it. This is a tried-and-true driver of new business!



[View Infographic](#)

Marketing Toolkit

Direct Messaging (Social Media)

Understand tried & true methods to scale your marketing through direct messaging.

With your Marketing Virtual Assistant, find the perfect brand voice and have them start conversations to nurture your prospects.

Slide into DMs. What do you say when you start a convo?

- Simply, treat all social media as a networking event.
- When you meet somebody in person — think about how
- Engage and solicit casually, i.e. “Nice connecting with you, I have a great idea. I’d love to share it with you, what’s your cell? Can we chat about it?”
- A response rate of 5-6 people out of 25 is a good start.
- The higher your brand’s credibility online, the more responses and messages you’ll get (keep working on PR efforts!)
- Get used to rejection, don’t take “no” personally—it’s going to happen.
- Focus on the few that respond!



Watch How-To Video

[LINK](#)
(30 min)

Share the link with your virtual assistant as a training guide for beginning your direct messaging operations.



Marketing Toolkit

PR Marketing

It's important for any healthy business to effectively manage their PR.

Get proactive with your PR through your Marketing Virtual Assistant. Take it from Elle, a PR Virtual Professional from MyOutDesk.

She connects with over 10 media programs per day to foster PR partnerships. This helps the business that she serves LAND multiple appearances in high-traffic radio, live television, interviews, webinars, and podcasts per week!



Here are Elle's 6 TOP TIPS to a relentless mentality for effective PR...

- 1) If you want to land an appearance to a show or program, ASK!
- 2) It's all about adding value for those involved, not about you!
- 3) Follow-up is GOLD. Respect the timeline set by the producer.
- 4) Understand and honor their preferred mode of communication — EMAIL or CALL and stick to it!
- 5) Be authentic.
- 6) Research and listen to the prospect's content! It's important to understand the messages & values behind the program or show. - Focus on the few that respond!



Marketing Toolkit

Video Mastery

With your Marketing Virtual Assistant, you may want to take your video marketing content to the next level...

Personal Brand: Increase your credibility and connection to people with different types of bio / promo videos.

Business Brand: Does your brand name (as a product, service, agent, or team) have a video?

Mailing List: How often does your subscribers hear from you and how often is it via a video?

Testimonials: There is nothing better than someone else bragging about you. Testimonial videos are HUGE!

Products: Show ANY product, service, or house with video that matches what you're listing (yes, ANY listing)



Watch How-To Video

[LINK](#)
(1 hour)

Share the link with your virtual assistant as a training guide for beginning your next video project.



Marketing Toolkit

Starting A Podcast Production

Like all entrepreneurs, you have many content ideas and need to keep up with spreading your content everywhere. This is the recipe to produce and launch a Podcast immediately with a Virtual Assistant.

You have the ability to start a podcast and stand out from the crowd. Launch your new podcast and upgrade your online presence with a marketing virtual assistant.

Content Strategy for Podcasting

- 1) Setting Up a Podcast & Conducting Interviews: [Link](#)
- 2) 23 Tips for Quality Podcasting: [Link](#)
- 3) How B2B Podcast Can Boost Your Brand: [Link](#)





Marketing Toolkit

Marketing for Virtual Real Estate

In this STRATEGY-focused video, understand the magic of selling physical real estate through virtual solutions.

As a top-performing real estate broker who has coached tens of thousands of agents & brokers around the world, Knolly Williams has over 300 listings without ever physically seeing any house, and he's been doing this since 2008!

Tune in to understand what a **virtual real estate model** looks like + how you can leverage your virtual assistants to prepare most aspects of the transaction and marketing.



Watch How-To Video

[LINK](#)
(1 hour)

See also: [*Marketing as a socially-distanced business*](#)



VA LAUNCH GUIDE

COMMUNICATION

“Open your door to me and I will exceed all of your expectations.” - Martin. A, MyOutDesk Virtual Assistant.

Communication is the gateway to success with using a Virtual Assistant. Be open and clear with your communication and the sky's the limit with what they will accomplish for you.

As a hiring client, your job is to find the right fit for your business through profile and resume reviews, then encouraging their communication with you or whomever will be their point of contact.

“No question is a dumb question” - who knows...

Encourage your Virtual Assistant to ask questions and gain understanding around anything they need. Make their job easier and increase productivity by creating a clear understanding of your business and the tasks they are to perform.

Screen-share... it's FREE!

Use screen-share technology to teach your VA how to perform a task, about your systems and your office procedures and policies. Being face-to-face will speed up the “get to know you” phase of having a new team member.

Get on skype and share screens, speak face-to-face and clearly communicate your needs and the expectations you have for them in their role on your team.

Demonstrate in real-time exactly how you want a task done and then enjoy the benefit of investing that first bit of time with your new Virtual Assistant. It will go a long way.

Remember, your VA will be very self-sufficient, but there is a learning curve to any new job. Invest some time with them in the beginning and enjoy the benefits for years to come.

Your willingness to openly communicate will be a pivotal element in the launching process and the speed at which your VA gets up to speed. Be patient and communicate and your expectations will be exceeded.





VA LAUNCH GUIDE

SYSTEMS SETUP and RESOURCES

What systems will your Virtual Assistant be using? In any business there will be systems that your new hire will require access to and it's important to be prepared with a strategy to get them setup.

We have identified a few of the possible systems that your Virtual Assistant will need access to, however, there are many more and every business is different.

- Email
- CRM
- Phone
- Skype
- Google Voice
- Google Hangouts
- Scripting
- MLS
- Website Dashboard
- Cloud Storage - ex: Dropbox

When your VA gets started in your business, set aside time (or have another staff member) to help them get setup and integrated properly.

One of the most annoying things to manage is tech issues that could have been avoided by investing a little bit of time on the frontend with proper setup.

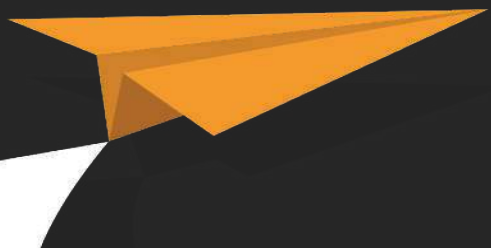
REPORTING and DOCUMENTING TASKS

You know that reporting is important in your business and it is in your VA's business as well. Consider how you would like your Virtual Assistant to report on their tasks.

It's very common for the MyOutDesk Virtual Assistants to create or use a **Start Of Day (SOD) report** and also an **End Of Day (EOD) report** that is emailed to you or their contact at your office.

Effective reporting and documentation offers the VA clarity on expectations, opens the door for feedback on the allocated tasks and helps them remain efficient in their efforts.

Prepare some reporting metrics that you would like to see. If you aren't interested in documenting tasks and daily reporting, that's okay too... but do yourself and your VA a favor and start with having them report daily. Decrease the frequency over time, but get started with it to assure yourself and your VA that they are both productive (to your standards) and also effective.



VA LAUNCH GUIDE

Here is an example of a **Start Of Day (SOD) report** created by a Virtual Assistant (Marjorey) to help report on her tasks (this report is based on a Prospecting Assistant). This also includes the intro of the email correspondence Marjorey uses:

Hi Kevin,

Good morning.
Here is my agenda for today:

1. Call all leads under 1-14 days.
2. Call out and email Market Snapshots
3. Work on current leads
4. Update leads with specific properties - follow-up

If you need anything else from me, please let me know.

| Date | Number of lead reviewed/calls dialed, VM, busy, not in service | Number of conversations | Numbers of appointments set | Numbers of Leads to be nurtured/ set up e-alert | Numbers of Property Valuation Request | Number of referrals to the inhouse lender | Murklands/ Below 150k/ area not covered | Number of leads emailed/texted | # of Drip Plans set |
|--------------|--|-------------------------|-----------------------------|---|---------------------------------------|---|---|--------------------------------|---------------------|
| 29-Jun | | | | | | | | | |
| 30-Jun | | | | | | | | | |
| 01-Jul | 28 | 3 | 1 | 3 | 0 | 0 | 2 | 10 | 3 |
| 02-Jul | for make up - July 6-9 2 hours daily | | | | | | | | |
| 03-Jul | HOLIDAY- MODCON EVENT | | | | | | | | |
| Week 1 Total | 28 | 3 | 1 | 3 | 0 | 0 | 2 | 10 | 3 |
| 06-Jul | 32 | 7 | 2 | 12 | 0 | 0 | 0 | 13 | 4 |
| 07-Jul | 29 | 2 | 0 | 2 | 0 | 0 | 0 | 10 | 2 |
| 08-Jul | 35 | 5 | 0 | 3 | 0 | 0 | 0 | 15 | 5 |
| 09-Jul | 16 | 5 | 1 | 3 | 0 | 0 | 1 | 9 | 3 |
| 10-Jul | 33 | 6 | 0 | 4 | 0 | 0 | 0 | 8 | 2 |
| 11-Jul | 13 | 2 | 2 | 1 | 0 | 0 | 0 | 5 | 1 |
| Week 2 Total | 158 | 27 | 5 | 25 | 0 | 0 | 1 | 60 | 17 |
| 13-Jul | 27 | 5 | 3 | 2 | 0 | 1 | 2 | 12 | 3 |
| 14-Jul | 18 | 2 | 0 | 10 | 0 | 0 | 0 | 10 | 8 |
| 15-Jul | 15 | 3 | 2 | 2 | 0 | 0 | 1 | 5 | 2 |
| 16-Jul | | | | | | | | | |
| 17-Jul | ABSENT | | | | | | | | |
| Week 3 Total | 60 | 10 | 5 | 14 | 0 | 1 | 3 | 27 | 11 |
| 20-Jul | 20 | 4 | 1 | 4 | 0 | 0 | 2 | 8 | 3 |
| 21-Jul | 28 | 5 | 3 | 5 | 0 | 0 | 1 | 11 | 4 |

Footer: EOD Daily Tracker | Worked leads | 14 days bucket-new | Leads with spec prop | Market snapshots | Phone Apptointments | Action Required | Leads For Up | Declined Email | Average: 5396.392771 | Count: 36 | Sum: 404434



VA LAUNCH GUIDE

Here is an example of an **End Of Day (SOD) report** created by a Virtual Assistant (Marjorey) to help report on her tasks (this report is based on a Prospecting Assistant):

| Tasks | Start | End |
|---|-------|-------|
| Call out -14 days new leads | 10:00 | 12:00 |
| Transfer leads to Mark Paulson - from Lisa | 12:00 | 02:00 |
| LUNCH | 02:00 | 03:00 |
| Call out -worked leads/ with specific properties/ snapshots | 03:00 | 06:30 |
| EOD/ To do list | 06:30 | 07:00 |

Any reporting strategy that you find efficient for your business should be used, these were examples that a VA is using for her client.

You may also task your Virtual Assistant with creating their own reporting system that will be easy for them to use and update (quickly) on a daily basis.

One last note on the subject of reporting and documenting tasks; this will become very useful down the road when we discuss feedback loops.

INCLUSION

Who doesn't like to be included? It's a natural part of human existence. Understand it, use it and create an amazing team member in your Virtual Assistant.

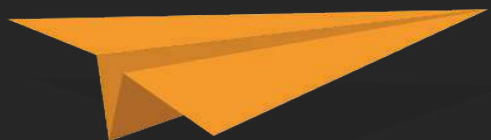
Like most everyone, your VA will want to be (better said, need to be) included in your team and your business. From morning huddles to strategy sessions, your VA is a team member and while he/she may be on an island in the Philippines, make sure they don't feel like they are.

Call them via Skype, turn on the camera and allow them to be in the room with you.

Bring them into trainings and team calls that you conduct. Leverage your VA to help with collecting notes from meetings, give feedback from their experiences thus far - or if they're an experienced VA, they may have some insight that hold enormous value.

Include your Virtual Assistant in office emails, jokes, photos, etc. As goofy as it may sound, take an office photo, crop in there a photo of your VA on your computer screen and add them to the team. That gesture will go a long way for their self-confidence.

Also, as your business and other individuals in your business have successes, both in life and professionally, share those with your VA just as if they were in your office. Encourage them to share their successes as well.



VA LAUNCH GUIDE

TRAINING

No one wants to, but everyone **MUST** invest some time training your Virtual Assistant.

Have you ever heard of a person getting a new job and just jumping into the job without any training or guidance?

You know the answer, so I won't dig into it much. No one goes in blind and without a mentor/guide to get them up-to-speed.

Your Virtual Assistant is no different and requires attention from you (or your trainer) in the beginning stages of working with you. Calendar out some time to put in the work, it will pay you back in avalanches.

How would you train an in-house staff member? Think about it. What processes and systems would you walk them through? What clients would you introduce them to? Are there resources you would have them refer to in order to get going?

We like to refer to a system that works extremely well for Virtual Assistants, but also in-house team members:

PLAY. PAUSE. DO. >>>

It's a training system that requires some work up front, however, when complete, it becomes an asset you can use to integrate any new hires into your business for years to come.

Record some training videos (keep them short 5-7 minutes per topic) and upload them to youtube or vimeo (vimeo is easy and you can password protect them).

Have your VA watch the video of the specific topic training, then they pause it, and "do" a task using that training content.

Play the video

Pause it

Do a task using the content

This system works for nearly any new program or system you roll out in your business.



VA LAUNCH GUIDE

TASK ALLOCATION

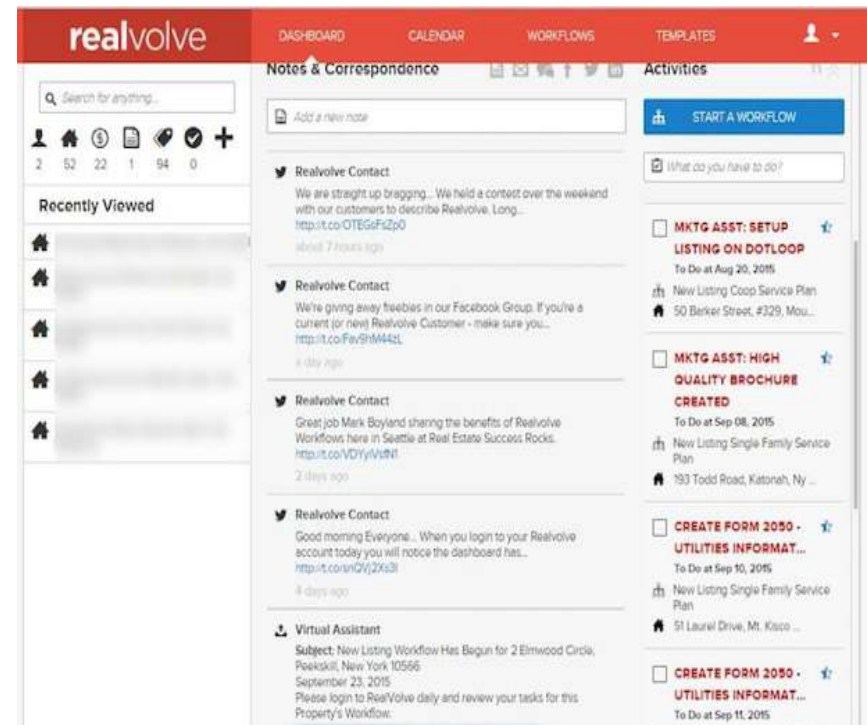
This needs to be done using a medium that is comfortable for you and for the VA. You can simply email your tasks to them and ask for them to be completed or use a system that allows you to reference back.

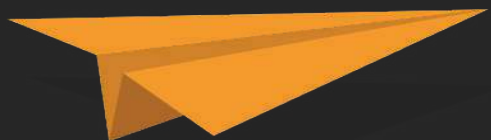
I think task allocation is a time-suck that a lot of agents trap themselves in. Rather than take an hour and create a system to reuse, reference and leverage for the future, they simply email a list of tasks and call it good.

Use a living spreadsheet in Google Sheets. Allow yourself, your VA, your other team members to edit and update the spreadsheet in real time and make it accessible to everyone from anywhere.

Create the ability to access anything on the go. Upload completed tasks, assets, etc. to a platform like Google Drive or Dropbox and make it easily accessible at any time and on any device.

Here's an example of one of our clients in New York who does task allocation through Realvolve.





VA LAUNCH GUIDE

SETTING CLEAR EXPECTATIONS

The success early on with your Virtual Assistant is highly dependent on the expectations you set and how you set them.

What are you looking to achieve with your VA in your business? If they're a marketing assistant, how will you measure performance? Do you know what you want to accomplish?

If you have a prospecting assistant, how many calls, how many conversations and what outcomes are you looking for?

How are you explaining these expectations to your VA? How are you tracking them? How are you providing feedback or rewarding them for the work done?

Remember back to the communication section where we discussed screen-sharing? This is the time to make sure you have a face-to-face conversation and be sure that you're clearly making your point.

We like to set goals, written and acknowledged by both the VA and yourself and then create an incentive around them if they are large or important. Give your Virtual Assistant something to reach for. The day-to-day job is great, but as you well-know, having a dangling carrot is good for improving productivity.



Your VA cannot reach your expectations if they don't know what they are.

Think about your expectations, know what you want and how you want it, then communicate it to your VA face-to-face.



VA LAUNCH GUIDE

FEEDBACK LOOP

Easily one of the most effective elements to creating a successful VA relationship is having a proper feedback loop.

You don't know what you don't know and you don't know what you don't track.

How will your Virtual Assistant know if they are doing a good job or not? Your feedback is how.

How often do you plan to provide feedback and how will you provide it?

Your feedback loop is going to be an enormously valuable part of your relationship with your virtual assistant. Culturally, Filipinos are very accommodating and want to please while exceeding your expectations.

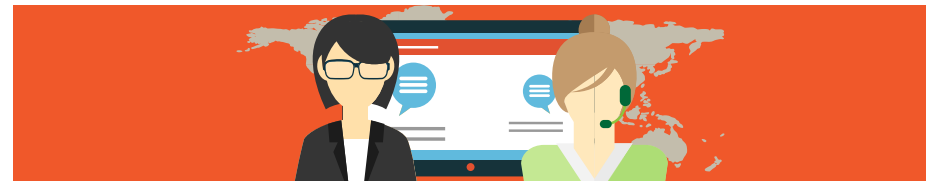
Providing feedback in an organized and constructive manner will increase their efficiencies. You will see improved performance and successful task completion by helping them understand how they are performing.

Consider using a review system to establish a baseline. Begin on a weekly basis, then move it monthly, then out to quarterly and so on.

Give a lot of praise when possible, especially in the beginning. Think of it as creating momentum and you will see exactly what we mean quickly.

When a task is not completed as you would like or up to the expected level you communicated prior, be sure to offer that constructive feedback. Ask for revisions, have your VA practice an improvement exercise and position them to succeed.

Early and often feedback will create a winning relationship for you both.





VA LAUNCH GUIDE

INTRODUCING MYTIMEIN

All-in-One Remote Team Productivity Tracker

MyTimeIn is our in-house scheduling software that ensures your virtual assistants & remote workers are on-time and productive. This is your go-to MyOutDesk client portal is a place where you can manage all aspects of your MyOutDesk account, in one place.

Manage your virtual assistant's (or assistants') department, teams, service accounts, schedule & PTO, and payroll.

Real-Time Visibility – This feature allows you to have real-time visibility into your Virtual Assistant's productivity as they are working during their shift. You get real-time status updates, so you are never left in the dark as to what your Virtual Assistant is working on!

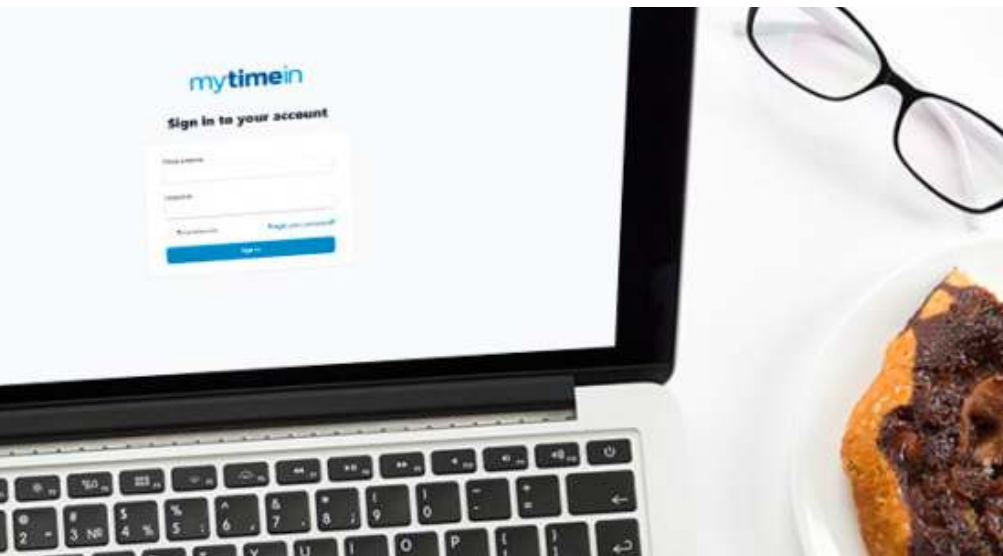
Billing and Invoicing – Through our client portal, you can also keep track of your billing and invoices. You can manage your information and view and print your invoices as well. You won't need to wait for anyone to send you your invoice or call anyone as all the information will be ready for you here.

Work History – On MyTimeIn, you will be able to access historical data on your Virtual Assistant's work hours.

Support – If you need any assistance with your Virtual Assistant, say for example, you need help to train them on a particular system, or you want to change their schedule—whatever need arises, you can get support by merely logging in to our Client Portal.

Manage Email Preferences – You can set your preferences in receiving emails from us through here as well.

Scheduling & Timesheets – In-house scheduling software that ensures your Virtual Professional is on time and productive.





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