

## Onboarding a VA

Okay, now that you have a pool, now that you've hired somebody, the critical element here is onboarding your virtual assistant. And we're going to go through this four-step process right now, of how you bring somebody aboard. And again, I don't care if this is a one hour a week person, 10 hours a week, you're going to go through the same process.

You're going to have the welcome call, you're going to share your procedures, they're going to do the work and you're going to review it and give them feedback. We could probably stop right there, but I want to drill down into each of these. So you found somebody or you found two people. Either way, you want to have a welcome call with all parties. That would be you and that would be the VA or VAs that you're bringing on.

And inside of here, what do you want to do? Well, you want to reiterate the job description, okay? You want to welcome them aboard, hence the name, welcome call. You want to thank them. You want to start establishing more rapport. It's a continual process, right? It's not one and done.

But what we want to do is we want to just reorient back to that job description that we shared initially. Why they signed up, what they're going to be doing. And on this welcome call, you go through the procedure share. So remember, back to documenting procedures, to optimizing procedures? All those things are very important and this is when you're going to share the video, the transcript, and the checklists. You're going to go through the very first thing, or things that they're going to be doing, so that they can do it.

So let's go back to the procedures of doing the emails. So let's say that you've documented that. Remember, you can't have somebody do this task until you've gone through the procedure for it, until you've documented, until you've optimized, until you've created the checklist. If not, then just hold off on that one. Do the simple things, in terms of documenting and optimizing the procedures, off-board that and then come back.

Because what the virtual assistant is doing is freeing you up, freeing up time for you, so that you can gain time to do things like this document. Now, I'll tell you, doing this is going to add a little bit more time at the beginning, but it's a short-term sacrifice for a lifetime of investment. You may have to spend eight hours on this, but you're going to gain 80 hours over the next two months, or 80 hours over the next six months. There is going to be an ROI on it, it's just not going to be immediate.

So we had the welcome call and we shared the procedure. I recommend that you just start with the one. Okay? Even if there's three things that you're going to give to your virtual assistant, start with just one. Okay? Keep it simple. So you've shared that. You've had her, now she has gotten all of the access to the video, to the transcript and the checklist. Now, you're going to have her to do it.

Whether it's checking your email, whether it's scheduling appointments, whether it's washing the car. I don't care. They're going to go through and they're going to go through and understand the process. They're going to understand the procedure. They're going to go through the checklist, and now you set them free for them to do it.

Now, I can guarantee you, probably 90 times out of 100, it's not going to be done perfect. Okay? It's not going to be done the exact way. Even though you've documented, even though you've done checklists, there's probably things that you've omitted and this is a great chance for you to ask, how can I do my process better?

Remember, we said that this is an evolving thing. And we're also eventually going to ask our virtual assistant to be thinking, how can I do this better? Not at the beginning. We want to plant that seed. But what she's doing right now is she's just learning kind of how you do it, right? This is all new. You can't really make a fair assessment just yet, but you always want to plant that seed, be thinking, how can I do this better?

If you're working with a great virtual assistant, she's going to know that already. She's going to come to you with ideas and things and ways that other clients have worked. So one of the great things about working with a virtual assistant that has many clients is that they've gained synergies, they've gained an understanding of how they can do things better, and they're going to communicate that to you.

Make sure that you explicitly say that's something that you expect and you want from your client, that you want from your virtual assistant. And reward them when they do that sort of thing. Monetarily and acknowledgement and all the other things that you want to do.

Welcome call, the procedure share. Now, you've let them go. Now, they're doing it. As soon as they do this and it's important that the timeline here is right. They do it, you, as soon as they get done with it, as soon as possible, want to review that work. While it's fresh on their mind, while it's fresh in your inbox, or your to-do list, you want to go and review that.

And then you want to give them immediate feedback. What did they do right? What do they need to change? Is this a problem with the procedure? If it is, then let's redocument it, let's change it up, let's change the checklist and let's record the video eventually. So again, continual improvement on that.

But this right here, number four is what a lot of people don't do. And I know that for me, it was tough too, especially when we were really busy, like tax time and we were preparing a bunch of stuff. It was like, heck, I'm just going to fix it now and later on down the road, I'll get with them. I'll give them feedback. I'll teach them how to do it better later down the road. That later down the road never happened.

So while it is a pain in the butt to have to give them the feedback, to have to walk them through that, it is going to make it so much easier on them. It's going to make it such that you don't have

to review this every single time or change it every single time, whatever the case was. So be sure and give them that feedback and work together with your virtual assistant to say, all right, that wasn't done to my liking. Was that because I left out a step? Is that because you missed a step? Is that because one of the steps needs to be eliminated? Is that one of the steps needs to be automated? Again, working with your virtual assistant is very important.

Now, one thing that I also didn't mention on the hiring, I want to bring this up while it's still fresh on my mind. If you can have somebody else on that call that's doing the interviewing with you, so if you have another team member, it's great to have them. If you don't have another team member, then maybe it's your best friend, maybe it's your sister. They don't have to know who it is, right? But having another set of ears, another set of eyes is always instrumental. That just came into my head and I want to make sure that I bring that up.

But back to the onboarding process. Make sure that you give them review, with feedback. Now, what I tell them, let's say that this is email and they did it today. There's a little bit of feedback. And then I come back to them the next day and I go, okay, they do it the second time. They nailed everything. They did it the third time. They nailed everything. This isn't something that's client facing, meaning the client is going to know about it directly. It's not communicating with the client.

I'm probably going to say, all right, she knows how to do that. Let's move on to the second procedure. Second procedure is calendar. Okay? It's a little bit more complicated. So what do I do? Well, it's not a welcome call anymore, it's a procedure share.

So I share that procedure. Here's the video, here's the transcript, here's the checklist. Here's where you do it, go for it. Let her do it. Let her start scheduling those appointments for you, and then give review as soon as possible with feedback. This one right here is instrumental. And the timeliness of it is critical, because you don't want to wait a week and then go back and then she's going to have forgotten what she did. You're going to just have done it probably. And so doing this in quick time after she has completed the process, the procedure, is of utmost importance.

Now, can a VA, can a virtual assistant do everything that you need to do? Well, probably not. Now, a lot of times you can find virtual assistants who have experience with a bookkeeping software. They may have been a bookkeeper in the past, and those are great finds. But they're rare finds. While they're utility, it's hard to find somebody who's a really good VA and really good at bookkeeping.

But what we want to do is we want to start off-boarding more and more tasks, more of those things that we're incompetent or competent at, and then getting into the excellent category. Always focusing on the unique abilities that we had, that we talked about in productivity, okay?

But what you want to do is you want to say, all right, and this becomes a game. It becomes a very fun game of going, all right, what else can I give to her? Here's this, and it comes back to the same thing right here. Now, as you start to get more and more work off to them, more and

more hours, marketing and hiring are two things that you never want to stop doing, or at least recruiting.

As in marketing, we always say never stop marketing doesn't mean you have to take on clients. Same thing here. Never stop recruiting doesn't mean that you have to hire them. So I like to keep an application open on Upwork, if that's what I'm using. I like to keep my ear to the ground, asking other people about their VAs. I like to make sure that I always have somebody. So in case this VA didn't work out, remember one is none, as two is one. Always have somebody on deck. And it's a best practice if you can hire two people, if you can spread the love, spread the hours out. So then in case one leaves, you're okay.

Embrace the power of VAs. You're never going to know everything. I've given you the shortcuts. This is the things that we have learned firsthand with using them. Now, we do talk about bookkeepers and hiring them. It's the same process, just a little bit more complicated, in terms of the technicality and how we hire and how we go through that process. It's a more arduous process, but for right now, for most of us, we can get away with a VA, a qualified VA, as being our first hire for a good long time. Getting a lot of energy, getting a lot of time back, and that's what it's all about.

Virtual assistants, embrace them and use them to the best of your ability.