

# Episode #275: 6 Tips for Selecting the Right Virtual Assistant for You

Thank you for attending today's episode of "Money Script Monday." My name is Sara Sullivan and I am the licensing and contracting manager here at LifePro Financial Services. I've been with the company for a whole 20 years next month and have been doing licensing and contracting for about 12 of those years. Whether you've been with us for a while or are a brand new agent, hopefully, I can bring some of my knowledge and experience to you in a clear and concise manner. Not only have I been an executive assistant to two leaders here at LifePro, but I've also helped with the interview and hiring process over the years, and I work daily with the assistance of our advisors. I think my experience with how much an exceptional assistant in office or virtual can be an asset to your practice is more than worth sharing. As is with pretty much everything we do at LifePro, our entire function is to do the legwork for you. Hopefully, the findings I've collected will free up a bit of your time to do what you do best, and that is sell.

This presentation is actually an accompaniment to my previous "Money Script Monday," about finding the right in-house assistant for your practice. After that was aired, I had several advisors reach out to me with various questions about virtual assistants and if I knew anything about them. Here at LifePro, when you ask, we listen and you receive. So I hope that those advisors that came to me are listening today. So as we know post COVID, it's a bit of a different world. I won't use the term new normal because it really isn't everyone's new normal. LifePro is totally back to normal and has been for some time. Everyone comes to the office every day and lots of other folks are back to normal as well, which is so awesome. But so many people are used to remote work now and there are benefits. Most of those are financial and convenience related.

By employing a virtual assistant, you're often able to save on overhead costs, like travel, office equipment, vacation time, and benefits. And now, without further ado, here are six helpful tips for selecting and hiring the right virtual assistant for you. Tip number one, be crystal clear about the responsibilities your new VA will have and the qualifications they should have. One common mistake that happens often during the process is hiring someone to do everything when really they only want to take on select tasks. Make sure you are explicit about each responsibility and what it will entail. Or if you do plan to make someone part of your team and mentor them or have them take on future responsibilities, make that clear as well. And be sure to have the picture of your future as a one-person franchise or company in mind while making your selection. During the process, try to envision that person with an even greater role and see what manifests.

It's important to clarify the duties to your new VA. Will they be handling research and reporting? Inbox and schedule management? Are they going to be booking travel and tracking your expense reporting? How about project coordination? Do you require social media assistance and monitoring? Probably, because it's of the utmost priority these days. Is there any bookkeeping involved? What about conveying personality and the culture of your workspace? Does the person need to be bilingual? Typically, most people seek out U.S.-based companies, but offshore virtual assistants actually cost less. They can also bring a diverse range of skills to the table as long as they're fluent in the appropriate language. It seems like a really simple thing, but lining up responsibilities and required qualifications will really set up your search for success.

Moving on to tip number two, show full transparency regarding core values and goals. I just mentioned culture in tip one. Core values are of absolute importance to any thriving business. It's a great thing about them is that they remove the element of surprise with regards to your business, your character, your culture, and your mission. The candidate's interest level in these things act as an initial gauge of their success rate

as your VA. Having an outline or even a light business plan describing your timeline and goals at the ready during your interview is highly suggested. If you haven't already, I hope you can visit the LifePro headquarters here in San Diego someday and see the main hall that everyone passes every day. We have a giant wall with both our mission statement and all 12 of our core values. It's a mosaic of lettering that's anywhere from 6 inches to a foot tall. That way, there's absolutely zero confusion about the direction of our path and the level of our standards. Please implement this tip of value-sharing during your search because I think it's crucial for finding the right fit.

Tip number three, make sure you understand your own strengths and limitations. Simply put, figure out where you're coming up short. Sometimes you may find that your effectiveness at delegating needs improvement too. Frankly, it can be a bit humbling to drill down what you're not that good at, but the process is much less taxing when you acknowledge that it's only for your improvement. It can also be hard to relinquish a bit of your power and pass along a task for fear of it being done incorrectly. That's totally understandable, but remember the whole point. By delegating these routine tasks, you'll prevent your own burnout and reduce your workload. Maintaining an optimal work-life balance is essential for operating at your best. With the VA, you'll have access to a wider pool of skills and expertise. Most have been involved in various business operations and niches, which can be a fabulous asset. Many have the entrepreneurial mindset that can help your business grow. Again, these things seem like simple items, but it's imperative that wherever you fall short, the virtual assistant will fill in the blanks. The individual must understand the importance of delivering quality results, meeting deadlines, and providing excellent customer service, etc., and which, of course, depends upon the roles that you're assigning.

Tip number four, ask the right questions, articulate and communicate. Good questions to ask are, what skills and experience do you have? What is your availability? What do you charge per hour? What are your

hourly minimums? What type of communication do you prefer? What tools do you use for your job? Do you have liability insurance? What type of contract do you prefer? What references can you provide? What is your previous experience? What department do you like working in the most? By far, the most common word I came across was communication. Smooth communication is totally critical and should not be difficult considering all of the methods that are available to us in 2023, like email, phone, text, Zoom call, or Microsoft Teams. Since your VA is going to be remote, it's vital that the lines of communication be open at all times. And especially when the relationship is new, sending too much communication is way better than not enough.

Tip number five, check reviews and references. This tip is pretty fundamental, but it's necessary even if the candidate came to you as a referral. There are countless services available online, but my main advice is to A) let the candidate know that you're going to be reaching out to the listed references, which goes along with my communication and tip number four. Then when you do talk to the references, pay special attention to specific instances and stories describing a time when that candidate really went above and beyond without being asked. This is a good indication of an efficient self-starter and an independent worker. Remember, you're not going to be in the next room in the office across the hall from them. If the reference you speak with is unable to volunteer any of these anecdotes, it may be a good time to move on to the next applicant.

Last tip, number six, find a headhunter or recruiter to help you in your search. Obviously, you're going to want to pick one with an exhaustive recruiting process and a talent for vetting. One company I researched called BELAY, call their recruiters client success consultants. Coincidentally, their process is also six steps. It begins with the call to the company to identify your exact needs to determine if there is a fit for their services. Then paperwork is completed and you're assigned a consultant, after which a discovery call is booked to ensure that you're

being matched with the right talent. Next, a meeting is set up with the placement team where the ideal candidates are presented and discussed. Once your virtual assistant is chosen, a call is set up as the official start to your partnering where you meet the talent, set goals, discuss communication plans, etc. The fifth step is the onboarding process, and the last step is to have an ongoing check-in to assure that everything is progressing smoothly with you and your new virtual assistant and to address any pain points or hiccups. If it's just not a match, they'll pair you with someone else.

Prices vary all over the board with recruiting services. Some are specialized like a company called Boldly, and require the candidate to have X amount of minimum years as an executive assistant experience. There's actually a website you can peruse also that shows options even down to the most honed in and it's simply called [virtualassistant.com](https://virtualassistant.com). There, I came across a very highly-rated VA recruitment firm by the name of TaskBullet. With them, you can cancel any time, and they offer 100% money-back guarantee. They also utilize what they call a bucket system where the remote employee clocks in when you need them and clocks out when you don't, which can really save you some cash, as long as it's appropriate for your needs. Another solid company that I came across in my searches was WoodBows. They are rated the best customer satisfaction by Forbes Advisor on their list of the best virtual assistant services of 2023. They also boast a 98% client retention rate, which is pretty phenomenal.

Lastly, just to pull all of these recommendations and hopefully motivations together, remember that there really isn't any more profitable investment than investing in yourself. My wish for you, if you can, is to take that next step. My hunch is that after a slight period of adjustment, you'll be really glad that you did.

That's all for today. I hope you are able to take away some worthwhile tidbits from this session. And as always, if I can be of assistance with anything that you have questions about, please email me at

ssullivan@lifepro.com or call me at extension 3265. I encourage you to lean on us because that's what we're here for and it's what we love doing. So have a great day and thank you for your business.