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# 101 Ways to Use a Virtual Assistant

*(Used with permission from IVAA member Nina Feldman from original posting of 101 Ways to Use a Virtual Assistant.)*

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## Bookkeeping

- You need to pay your bills. You scan, mail or fax them to VA, or, with automatic billpay, bills are paid monthly automatically. VA sets up an online bill payment service with payment authorization for you. VA prepares payments and enters them into accounting software that you can also view from your own computer. VA notifies you how much money to deposit into account and pays 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, VA enters or downloads 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 e-mail VA with number of hours to be billed to each client. VA prepares and mails invoices. Or VA sets up way for you to track your hours with cloud-based software and bills clients regularly.
- Your association needs annual dues renewed. VA prepares invoices, mails them according to schedule, receives payments, and deposits them into association's account. All transactions are recorded in accounting software and sent to association via e-mail or kept on the web for association to view.
- You have past due account receivables. VA mails past due notices and follows up via telephone to collect.
- You prefer to pay your own bills but need monthly bank reconciliation. You mail or scan and e-mail VA copy of your check register and bank statement; VA enters data into accounting software and reconciles account. VA e-mails you accounting report or you view on secure site on the web.
- You prefer to pay your own bills, but need reminders to pay in a timely manner. VA reminds you by e-mail or telephone when due dates arrive.

## Database Management & Data Processing

- You fax, scan or mail VA copies of business cards you've gathered during the course of the month. VA enters information into contact database, uses mail merge to produce follow-up letter and either scans your signature, uses signature font to sign your name, or mails them to you to sign, and sends out letters. You e-mail new prospect leads to VA, who enters them into contact database and uses personalized mail merge to send introductory letter. VA monitors marketing follow-up program, sending pre-determined marketing piece every two weeks. Each week data is sent to you via e-mail or logged in a web database so you have a record of transactions. Prospects respond directly to you.
- You e-mail your clients' new policy information to VA, who enters information into a database and sends it to you via an e-mail attachment. VA prepares and mails standard confirmation letter to policy owner, tracking annual expiration date of policy and, on due date, sends reminder e-mail to you.
- You want to send a direct mail broadcast and need to verify your prospects, some of whom have missing contact information. You e-mail your prospect list to VA, who telephones each name, verifies spelling, title and address, obtains missing information, makes corrections, and returns list to you via e-mail attachment.
- You need to change database software. VA converts data and walks you through installing and learning how to use new software.

## Electronic Newsletters and E-Zines

- You want to publish a quarterly newsletter. You provide content to VA or VA helps with articles. VA designs and prepares newsletter, prepares labels, and mails or e-mails to your mailing list using an electronic newsletter program.
- You send out e-zine, newsletter or e-mail announcements and some bounce due to incorrect subscription requests or other e-mail failures. You forward related messages to VA, who correctly processes requests to subscribe, unsubscribe or delete bounced messages. VA manages e-mail database, adding subscriptions, deleting those wanting to unsubscribe, and posting announcements to list.
- You want to increase the number of subscribers to your electronic newsletter. VA lists 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 listings are accurate.

## Event Planning

- You'd like to run a teleseminar or webinar. VA sets up seminar, coordinates speakers, does a technical run-through with you or other presenters. During the event, VA monitors the seminar and troubleshoots any issues that may come up during the event. VA records and arranges to sell or share your teleseminar as needed.
- You need a venue for your next conference, seminar or event. VA researches venues and contacts to determine availability, size, and specifics. VA obtains written quotes, compiles a comparison, and reports findings to you.
- VA keeps in touch with speakers and sends out announcements about the event, keeping track of who has and hasn't responded and sending out reminders.
- VA arranges for someone to be there to greet and register your attendees.
- VA confirms that the necessary equipment (projectors, screens, recorders, refreshments, amenities) will be available at the event.
- During the event, VA stays in touch with you and the venue staff to make sure all is going smoothly.

## Graphical Presentation

- You need a PowerPoint presentation for a seminar. You scan or fax sketches of diagrams and charts to the VA, who prepares the PowerPoint slides and sends the document to back via e-mail or arranges for someone to show the slide show at your event.

## Internet Marketing, Social Media

- You have a Facebook, Twitter, and LinkedIn page, but you're not sure how to use them to promote what you do.
- VA does research to determine where your potential clients congregate online and find industry-related groups and organizations you can join. VA helps you brainstorm about questions you can answer on these sites to establish you as an expert in your field.
- VA follows websites and blogs that pertain to your industry and suggests updates and posts you can use to build your visibility online.
- You have tips and ideas for your clients. You send articles you've written to VA. VA gleans short, to-the-point segments and posts them to your social media sites or submits them to electronic newsletters, e-zines, and blogs.
- You know you need to create a personalized presence in the world of social media, but you're concerned that regularly checking Facebook and Twitter is going to take up too much time. VA sets you up with a free, easy, social networking and micro-blogging web service that enables you to post to multiple social networks simultaneously.
- You have been using your Facebook page to communicate with both friends and clients, but it's filled with personal photos and comments from family and friends. VA creates a Facebook business page using an attractive design and your logo, providing a professional platform from which you can send out business-related posts. VA sends a personalized invite to your clients asking them to "Like" your Facebook business page.
- You have been tweeting and posting to Facebook, but you don't know whether anyone is "listening." VA can use Facebook business page data to determine who your fans are and what it is they are interested in reading about you.

## Marketing Support

- VA helps you implement a marketing plan, submitting ads by deadline, tracking expiration dates, coordinating payment, and handling correspondence with advertising vendors, continually updating advertising report and/or advertising budget report for your review.
- You want to promote your business in the press. VA writes and submit press releases to local, national, and/or international media.
- You issue a variety of sales brochures. You (or VA) mail postcards using VA's contact info as return address. VA mails appropriate brochure upon receipt of request, updating your database with name, address, date and type of brochure requested.
- You want to monitor customer satisfaction. VA creates customer feedback questionnaire, mails to customers, receives completed questionnaire, summarizes responses and issues you a report.

## Mail, E-mail Services

- You want to fully utilize your e-mail software program (e.g., filters, auto-reply, signatures). VA walks you through how to set up and use it.
- You travel frequently, usually returning to a stack of mail, missing important correspondence. You forward mail to post office box near VA. VA retrieves and reviews mail, faxes or overnights urgent items to your hotel, responds to routine matters, and forwards non-urgent items to your office. To save on postage, some items may be scanned and delivered via e-mail.
- You need fulfillment for books, tapes or other materials. Orders come in, you e-mail VA with information or VA collects information from your website, prepares packages and mails.
- You can't keep up with your volume of e-mail and are missing important messages. VA sets up general e-mail account such as info@mycompany.com, retrieves e-mail, sorts, responds to routine requests, and forwards items of importance to your personal e-mail account.
- You're going on vacation and don't want to miss important messages. VA downloads your e-mail, or you forward your e-mail to VA. VA notifies individuals that you're out of office, contacting you with urgent messages.
- You want a way to automatically respond to standard requests to your website. VA creates an auto responder, monitoring and establishing database of who, and how many, are requesting information.

## Personnel & Human Resources

- You're looking to hire an employee. VA writes help-wanted advertisement, places ad, receives and reviews resumes, conducts initial phone interview, narrows selection to three individuals, and schedules an interview with you.
- You e-mail employment applications to VA, who verifies past employment, calls references, and reports findings to you.
- When a new employee is due to arrive, VA prepares and sends welcome package.
- You need reminder to provide annual performance reviews for your employee(s). VA tracks dates and sends you reminder.
- You need assistance with payroll requirements. VA verifies that all payroll requirements have been met, appropriate taxes paid and forms filed.
- You want to make a career change. VA prepares or updates a resume and cover letter for you, researches job openings, and submits resumes to potential employers, tailoring each to particular employer. After an interview, VA promptly mails out thank-you follow-up letter to potential employer.

## Project Management

- You use a variety of subcontractors, employees, or team members, but you find yourself spending all your time making sure they stay on task. VA keeps things running smoothly by regularly staying in touch with everyone, using online calendars and scheduling tools, e-mails, and phone calls to make sure everyone is meeting their deadlines. VA reports back to you by e-mail or you can check the online tools.

## Purchasing & Supply Procurement

- VA sets up online account on your behalf with your suppliers. VA works with you or your accountant to set up lines of credit with vendors and monitors keeping credit information current and accurate.
- On pre-specified basis, VA sends you list of office supplies you use on a regular basis. You check off what is needed and send back to VA, who re-orders, has delivered to you.
- You need to purchase new software, office equipment, or specialized product. VA researches makes, models and versions. VA calls several vendors, obtains pricing information, ascertains that product meets your requirements, and reports findings to you. VA then purchases item on your behalf. If item requires on-site setup, VA makes those arrangements as well as confirming with dates/times and travel information.

## Real Estate Assistance

- You have a motivated seller and want to emphasize that you're organized, professional, and committed to their needs. VA prepares 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 VA seller's contact info and VA prints and sends package. This can both give you an advantage for listing appointments and decrease length of appointments.
- You spend too much time scheduling showings and reporting to clients, with many phone calls back and forth. VA keeps in touch with clients and does your scheduling for you, using calendar you can both access online with the touch of a button.
- You need a flyer designed for your newest listing. You e-mail VA room descriptions and photos. Skilled in real-estate specific programs, VA enhances photos and writes text to romance listing. VA e-mails flyer to your list of buyers and interested agents.
- You send VA new listings, changes to current listings, price reductions, etc. VA enters them into MLS and your potential clients are e-mailed about updates.
- You need an edge over other real estate professionals who don't yet provide virtual tours of their properties. VA arranges panoramic visual tours of your homes for sale or creates dynamic Web commercial using your still photos.
- You'd like to show an attractive listing presentation to your potential clients. A VA skilled in using multimedia software creates presentation that you can show from your computer and creates 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. VA creates attractive thank-you notes and birthday cards and sends them out on your behalf, as well as helps you choose and send custom closing gifts.

## Research

- You need to target your online presence (see Internet Marketing / Social Media). VA researches where your potential clients congregate online and industry-related groups and organizations you can join. VA helps you brainstorm about questions you can answer to establish you as an expert in your field.
- You want to find out what your competition is doing. VA sets up tracking systems to determine what is going on with your competition and to monitor what other people are saying about you.
- You sell business success tools and seminars. VA researches a target industry, prepares list of companies, calls to identify a contact individual, then prepares and mails introductory material. After specified time, VA calls to verify information has been received and to schedule sales call.
- You need CDs duplicated. VA calls several vendors and obtains written quotes. Upon approval, VA sends original CD to vendor, designs and prints labels, receives completed order, attaches labels and sends package to you.
- You're interested as to who your competition is and what they're doing. VA does search online and compiles list of appropriate websites for you to look at.
- You're considering adding to your advertising. VA contacts possible advertising resources from Internet, magazines, periodicals, newspapers, etc. and acquires information on pricing, publishing dates, publishing deadlines, payment policies, etc. Information is compiled into report for you to review.

## Secretarial and Telephone Services

- You need to confirm weekly sales appointments. You e-mail your list to VA, who calls appointments, notes who is confirmed and who must be rescheduled, and sends list back to you.
- You need directions to a prospect's office. VA calls, gets directions, and e-mails them to you.
- You have routine paperwork to be filled out on a daily basis (e.g., sales call re-caps). You call VA with information; VA fills out form and faxes or e-mails 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 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 VA for safekeeping. In the event of a disaster, your files are located off premises.
- You travel frequently. 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 VA, or record on your voice mail that callers with urgent messages may contact your assistant. 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 VA. Or you obtain separate phone line in VA's office so that a live human voice will answer with your company's name.

## Transcription

- You need a telephone conversation (e.g., conference call, tele-class) recorded. VA records call and transcribes for participants.
- You dictate letters and memos or interview a subject on a digital recorder. VA transcribes recording, prints letters on your stationery and mails them the following day, or e-mails you copy of verbatim interview.

## Website Design, Development, Maintenance

- 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 coding 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. VA edits or uploads new information to your website, whether site was created by VA or by someone else.
- You want to be able to make simple text changes on your website when you add a new product, service, or announce a new event. VA creates a website using WordPress or other template, allowing you to make changes easily and quickly yourself.
- You need to promote your website. VA performs keyword research, optimizes your web site pages for search engine traffic and submits URL, key words and description to various online directories.
- You want to improve your website traffic with related links. VA contacts similar websites and requests mutual link exchange.
- You hope clients find your website - and keep coming back. A VA knowledgeable about Search Engine Optimization (SEO) gets you well positioned within search engines, makes updates on a regular basis to keep your website from getting "stale," and periodically checks regularly for broken links or errors.
- You don't have time to monitor website traffic. VA monitors traffic reports and makes recommendations for adjustments to improve traffic.
- You provide training or coaching sessions or sell e-books or other publications. VA sets up and maintains an online shopping cart to manage your e-commerce, including updating product information on your website, creating marketing campaigns, and tracking your inventory, orders, and customer retention.
- You want to create videos and podcasts for your website, or edit and update the ones you have. VA can arrange for recording and upload videos and audio to your site.
- Your current website is starting to look old fashioned. VA designs a new logo, background, and fonts.

## **Word Processing**

- You take notes at meetings and need them typed. You mail or fax notes to VA, who types them and e-mails them back.
- You need to send a series of letters. You fax handwritten drafts or dictate over the phone to VA, who types letters, faxes or e-mails them to you for approval, prints them on your stationery, and mails them.
- You need a manual typed. You mail compilation of old documents with handwritten corrections to VA, who consolidates them, types them up and e-mails to you.

## **Writing, Editing & Proofreading**

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