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This newsletter focuses on the first step in the process of engaging a virtual assistant and subsequent issues will deal with other important issues surrounding finding the right VA. Most of these issues fall within the realm of Human Resources and, as I am not an expert in the HR arena, I suggest you pick up one or both of the following books:

- *The Essential HR Handbook* ([www.theessentialhrhandbook.com](http://www.theessentialhrhandbook.com)), co-authored by Sharon Armstrong and Barbara Mitchell, published by Career Press in 2008
- *The Big Book of HR* ([www.bigbookofHR.com](http://www.bigbookofHR.com)), co-authored by Barbara Mitchell and Cornelia Gamlem, published by Career Press in 2012

Although these books were written with the corporate HR manager in mind and you will be contracting (with an individual or a VA service company) rather than hiring, the basics remain the same.

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## Engaging a Virtual Assistant – Part 1

A common refrain among solo-preneurs, independent professionals and small business owners is "I know I need a virtual assistant (VA), but haven't a clue about how to get one." Finding the VA who is the best fit for your business is not always an easy task and there are many horror stories floating around.

So, where in the world do you start? One very important factor to keep in mind is that outsourcing requires the same process and due diligence as when hiring an on-site employee or contracting with a consultant.

Beginning with a **Job Description** will make the entire process much smoother. For this discussion, we are going to use a wheel analogy. A well-rounded wheel will quickly and efficiently get you to where you want to go; in this case, to engage a VA.

The wheel hub or center of the job description is where you define the **tasks** you will be delegating to the VA. Identify the tasks for which you require immediate assistance. (If you are aware of other tasks that you will want to delegate in the future, by all means list them, but don't get bogged down trying to be all encompassing at this point.) As with anything, the more detailed you are, the easier it will be to find the match you are seeking. Begin by writing down the specifics for each task along with the information that is needed to accomplish it.



Now that the wheel hub is set, you are ready to get into the **details** or the spokes of the wheel that connect the hub to the rim. Each bullet point below covers a spoke from the graphic above. Your wheel may have more or differently labeled spokes.

- Necessary Qualifications - this spoke is not to be confused with the one marked Skill Set, rather it focuses on:
  - Required knowledge/education/certification - for example, do you need someone with medical or financial background?
  - Working conditions - does the VA have dedicated office space? Will your VA need to store materials for you, i.e. marketing collateral?
- Hours
  - VA availability - how many hours per week or month will your tasks require? Will there be a minimum or a maximum? (You may need to guesstimate.)
  - VA accessibility - will your tasks require the VA to be "on call" during normal business hours Monday through Friday? Or, can your tasks be completed "after hours" and on weekends? If the VA is available only two days per week, will that work for you?
- Skill Set
  - Experience
    - Level - entry level/mid-range/experienced - executive support or lower level support
    - # of years - minimum years of experience or a range (5-10 yrs)
    - Industry specific - does the VA's experience need to be in your industry or not?
    - Comparable - is the VA able to do what is required even if the specific industry experience doesn't exist?
  - Technical skills - are you willing to provide for any training?
    - Typing (#/min); compiling documents; newsletter/e-zine preparation; adding graphics and/or animation to PowerPoint presentations
    - Proofreading and/or editing skills
    - Communication - will the VA need to compose professional letters or email messages to your clients? Will the VA be interacting with your clients over the phone or Skype?
    - Calendar/schedule management
    - Accounting software
- Equipment - what specific equipment is needed in the VA's office? Are you willing to provide any missing pieces?
  - Computer - PC or Mac; operating system; type of internet access
  - Printer - b/w; color; ability to fax; printing speed

- Scanner
- Dedicated phone line
- Card scanner
- Software - what specific software programs must the VA have? Are you willing to provide any missing pieces?
  - MS Office - what version? Does it have to match yours?
  - Calendar system - specify calendar system you want to be used (Outlook, Google, etc.)
  - PDF conversion - will the VA need to convert files into PDFs? Need more than basic conversion, such as editing within PDF files?
  - Other - what else is needed for software requirements? Be sure to list all the mandatory ones as well as the nice-to-have ones.
- Other - anything else that is required for successful completion of the tasks, such as:
  - Personality - overall demeanor needed; someone quietly efficient or outgoing or...?
  - Availability for on-site work
  - Initiative and decision-making skills

Once all the pieces - the tasks (wheel hub) and details (spokes) - have been identified and defined, you can put together your formal job description which becomes the rim that holds the wheel together. Now you can get the word out that you are seeking to engage a VA. There are many avenues to accomplish this, among them:

- Craig's list or other advertising sites
- Listserve groups
- Word-of-mouth referrals from colleagues or through networking

The next steps in the process include reviewing resumes, interviewing applicants, checking references, and much more. These will be discussed in subsequent newsletters.

At S.E.D. Services, LLC we partner with our clients to reduce the amount of time spent on support tasks with the goal of increasing the time available for revenue generating activities.

If you believe this information will benefit a colleague, please feel free to share it.

**Sincerely,**

*Susan*

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