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Susan Devereaux
Principal

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A new year is just around the corner. Hopefully you've already begun your planning for 2014. Here at S.E.D. Services, we are hard at work helping you finish the year strong.

And to start 2014 off, we are developing a new tool: an Outsourcing Needs Assessment to assist (potential and current clients) in identifying tasks that if outsourced, would allow our clients to focus on what they do best. We expect the assessment to be ready for publication in January.

However, because you are serious about your business and waiting until January would stifle your progress, I am inviting you to [contact](#) me directly so we can get started now! Imagine starting the new year off doing more of what you love to do!

In the meantime, I hope the insights Pam Krulitz provides about her experiences with a VA will benefit you.

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Pam Krulitz' Experiences with a VA

I have been working with SED services for a few years, and am grateful every day for the support my VA provides. As an executive coach and leadership development consultant, scheduling is a critical part of my business, and I rely on my VA tremendously to manage my calendar. Not only do I meet with upwards of 20 clients on a regular basis, but I also often do stakeholder interviews, getting feedback from 12 – 15 people they work with at the beginning of an engagement. The thought of doing all of that scheduling myself actually makes me very anxious!

I try to practice what I preach with clients – get clear on what you're good at and find great people to rely on for the rest! As a

Myers-Briggs ENTP, scheduling just isn't in my preference zone! Knowing that my VA has it under control provides tremendous relief and confidence, allowing me to do what I do best. I'm much more excited about taking on new clients when I know that I personally am not going to have to schedule 20 – 30 meetings over the course of the engagement.

My favorite feeling is when I check in with my VA, quickly go over the status of all of my clients, she leaves with a list of items to schedule, and I go about my work. And then, like magic, the emails flow in with meeting invites! She considers my travel time between appointments, she minimizes gaps in my time out of the office, and she knows when I need to be at my daughter's volleyball games and on a college visit with my son.

And then, when clients need to reschedule, she's available to do so quickly. Because I'm in meetings much of the day, she's available to clients and their EA's to shuffle the calendar as is inevitable. Doing that myself after meeting with clients all day is the last thing I'd have energy to do.

I've worked with a few different VA's over time, and have discovered a few things that have contributed to a successful relationship:

- Being clear on needs. I've found that some VA's work best in "project" mode (hand over a longer term project and they manage to the deadline), and some work best in on-demand mode (available most of the time for immediate tasks like scheduling). These are two very different rhythms and finding the right fit is important.
- Getting a clear communication plan in place. My VA and I have a check-in call at the beginning of each week to make sure we're in sync with what's on the horizon, what needs to shift and anything we've forgotten to tell each other.
- Being confident that the VA represents you as a person and a brand. I appreciate so much when clients and their EA's tell me my VA is great and helpful. I know that she's representing me well, is client-focused, and isn't coming across as a "gatekeeper".
- Being willing to acknowledge mistakes with each other. Inevitably, there are times (few and far between) when things don't go 100% as planned. Being able to acknowledge that, for both of us, keeps the trust level high.

Overall, having a VA has been a tremendous relief for me, and support for my business.

Pam Krulitz is a managing partner with [Isis Associates](#). As an executive coach and facilitator, she specializes in working with senior and high potential leaders who are making the transition to larger business leadership roles, requiring greater influencing skills, executive presence, political savvy and relationship building. She brings 25 years of professional experience to her work in helping clients develop strategies to ensure a successful transition to a new role, create a clear and compelling leadership vision, sustainably improve their authenticity and confidence, expand their leadership impact, and increase their engagement in their work and commitment to their organizations. Her clients have included Accenture, Marriott, MITRE, VeriSign, and a host of small to mid-sized businesses.

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

Susan Devereaux
S.E.D. Services, LLC
703-766-6590
sdevereaux@sedservices.com
www.sedservices.com

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