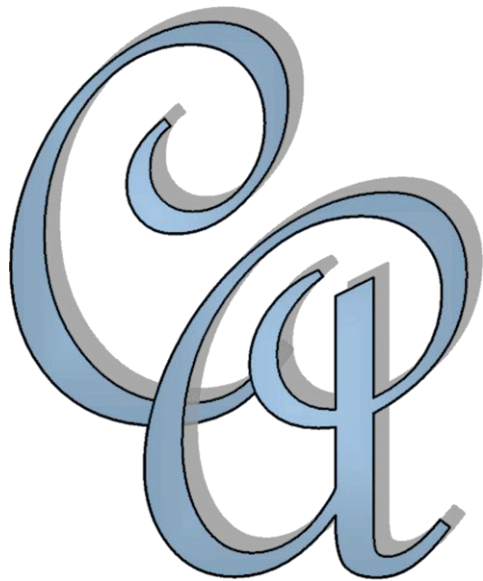


# Clerical Advantage

presents:



100 Ways to  
Utilize a Virtual  
Assistant.

The e-booklet

# 100 Ways to Utilize a Virtual Assistant

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Virtual assistance, it's a term that is relatively new to the business world. In fact, depending on which website you might be visiting the term Virtual Assistant can mean completely different things. For those of us in *the professional virtual assistant* industry the definition of a virtual assistant goes something like this:

A virtual assistant is a real, live person with personal experience in the business world. They utilize the latest technology in order to work independently and remotely, providing skilled professional support and services to busy, business professionals.

For many businesspeople, the idea of having an administrative assistant that works outside of the traditional office environment is mind boggling. How could anyone possibly do the tasks their business requires without physically being present? The answer is that it's simple and it not only makes sense, it saves their business money.

Advances in technology have brought us the mobile office warrior; business people connected to their offices via laptops and Blackberry. No one questions the ability of the mobile warrior to do his job and do it well. That same technology allows a virtual assistant to provide needed administrative support to any business. With e-mail, fast internet connections, secure file sharing programs and other technological advancements, there is no longer the need to have an administrative assistant sitting behind a desk in a tradition 'brick and mortar' office setting.

Once a business person gets past the initial reaction and truly embraces the idea of remote administrative assistance, they begin to see the advantages. Because a virtual assistant is a business owner themselves and not an employee, the added expenses of unemployment taxes, benefits and vacation time are eliminated. It might actually be a possibility to eliminate the cost of an actual office space as well. A professional virtual assistant will have all of the equipment they need including a computer, printer, fax machine and phone system. All of which add up to a sizable cost savings to the business.

You will generally find that a virtual assistants hourly fee is higher than that of a traditional, in-office employee, yet one needs to keep in mind the fact that if you add all of the overhead costs mentioned above, that traditional employee costs the business much, much more.

By now you may be thinking to yourself, "This virtual assistant thing sounds like something I'd like to know more about. Like what exactly can a virtual assistant do for *me* and *my business*?" That is the purpose of this e-booklet. Here you will find a list of 100 ways. Read through the list, mark those that fit your business and then find a virtual assistant to meet your needs. You and your business, will be glad you did!

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100. Set up a customer/client /contact database. Send all of those business cards to your virtual assistant (or VA, for short) and let them transform it into a database that allows you to sort and filter information, find information easily and speed up mass mailing with mail merge.

99. Design and coordinate printing of invitations for your next event. Your VA can design an invitation that incorporates your logo, find a quality printing service to print them at a competitive rate and have them mailed right to your door.

98. Coordinate and plan your next event. Not only can your VA take care of the invitations, they can book the venue, find and schedule a caterer, work with you on decorations and order them to be delivered, and even find someone to put the decorations into place.

97. **Manage RSVP's.** Have all the RSVP's for your event sent to your virtual assistant, they can keep track of who is and isn't going to be there, design name tags for those that attend and arrange for printing and delivery.

96. Prepare Power Point presentations and slideshows. Perhaps you need it for a meeting with an important client, or you teach classes. Your VA can take your information and transform it into an attention getting presentation.

95. Prepare handouts for a presentation or class.

94. Provide registration management for seminars or classes. Forward all of the registration information sent to your virtual assistant, they can keep track of information, let you know when the class or seminar reaches capacity as well as other pertinent information that will help make your class or seminar a success.

93. Create a customer/client survey. Want to know just how the participants felt about your class? Or what your customers experience with your product was? Have your virtual assistant prepare a survey. It can be mailed, e-mailed or accessed on the web.

92. Compile information gathered in surveys. When the survey is complete, your VA can compile all the information into an easy to read format.

91. Organize and maintain mailing lists. Do you have several groups of contacts that need different information from you company? Do you wish you could send out an e-mail just to the customers that purchase Item B? Let a virtual assistant transform contacts into mailing lists and manage them.

90. Create an instruction/training manual. Does your product require instructions? Do you have guidelines that must be followed by clients? Your virtual assistant can create a manual for customers and/or clients

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89. Transcribe your speech, presentation, papers, letters, etc. Just record it on your computer, e-mail the file to your virtual assistant and they will transcribe it and e-mail, fax or mail it to you in your desired format.
88. Post job opening with newspapers and online services. Thinking of hiring a remote employee of some sort? Your VA can draft the ad and submit it for you.
87. Verify former employment of potential candidates for the position. Now that you're getting resumes a VA can verify that they were employed where they said they were.
86. Screen potential employees and conduct telephone interviews. Shorten the hiring process by having your virtual assistant conduct telephone interviews. They can even call the best candidates back to schedule a second interview with you.
85. Prepare employee manual. Now that you've hired that remote employee, maybe you need a manual? Yup, your VA can do that.
84. Make business lunch reservations. You know that great restaurant that your best client loves? The one that requires reservations two weeks in advance? Have your virtual assistant call and get the table with the best view. Or the quiet corner booth for uninterrupted business discussions.
83. Provide directions to your afternoon meeting. Not quite sure how to get from that fancy restaurant to your next meeting? Your VA can get directions and send them to your e-mail for easy access.
82. Set up an online calendar. Your appointment book is a wonderful thing, too bad it is too big and bulky to carry in your pocket. Your virtual assistant can transfer all the appointment goodness from your book to an online calendar that you can access from any computer or mobile web device. And if those options aren't available, you can call your VA and they can access it and tell you what's next on your agenda.
81. Burn meeting materials, etc. onto a CD. Would it be helpful to give the participants of your meeting or class a copy of that slideshow, marketing graphs or other materials? Positive that paper documents won't make it off the meeting room table? Your virtual assistant can take the files and burn them onto a CD for you to hand out. You look technologically advanced; they take the CD back to their office.
80. Respond to requests for information. Can't keep up with the calls and e-mails for more information about your business or your latest product/service? Give out your virtual assistants contact information as the person to talk to for more information.
79. Create an address book. Are you always typing in e-mail addresses from little slips of paper? A virtual assistant can set up an address book in your e-mail program that will make those slips of paper trash can fodder.

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78. Update customer/client information. You know you got a change of address card from a client a week or so ago, but now you can't find the new information anywhere. A VA can keep all of your address book and customer information databases up to date for you.
77. Respond to customer complaints. Everyone hates complaints, but it's vitally important to your business that they are addressed in the proper manner. Let a virtual assistant use their customer service skills to find out just what's wrong and help you help your unhappy customer.
76. Customer /Client follow-up. Are you looking for feedback on how to improve your business? Did you promise a customer or client that you'd check in with them? A virtual assistant can do your follow-up contact for you as well as provide a report.
75. Design a killer brochure. A virtual assistant can take the time to go beyond the standard brochure templates. They can customize it with your logo and copy, as well as professional images instead of standard clip art.
74. Design your logo. Still haven't found the time to actually come up with a logo for your business. A VA (virtual assistant) can work with you and design several for you to choose from. (Did you know that it is against the terms of use to have a Microsoft Office clipart or office image as a part of your logo?)
73. Design your next advertisement. You know that plain text ads don't get nearly as much attention as something with eye-catching details, right? Let your virtual assistant kick it up a notch.
72. Design and prepare sales flyers. No more boring sales flyers for you. Let your virtual assistant design a sales flyer that doesn't end up in the trash bin.
71. Design your letterhead. Still just using your company name and address at the top of your correspondence? A real letterhead gives a polished, professional look to all of your company mailings.
70. Design your Holiday cards or Holiday mailing. It's that time of year again. Turn the holiday spirit into an opportunity to connect with clients, associates and potential customers. Your virtual assistant can design the perfect thing to make your business look merry and bright.
69. Mailing out your Holiday cards/ mailing. Now that they designed it, your VA can have it printed and mail them out...before the holidays are history.
68. Researching and ordering holiday gifts for clients, customers and associates. Let your virtual assistant find the perfect thing to let them know you value them.
67. **Find the best price or closest seller of that must have gift on your family member's gift list.** Your VA can help you fulfill those holiday wishes.
66. Develop an e-zine for your business. Offering online magazines and newsletters is great marketing. Give your virtual assistant the material and let them pull it all together in a desirable format that makes you look great and technologically savvy.

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65. E-zine distribution. Once the e-zine is developed, your VA can send it off to whomever you want to receive it.
64. Design a menu or price list. Would your business benefit from a hand-out menu or price list? A virtual assistant can design one that is more than just words and numbers on a page.
63. Conduct a direct mail campaign. Your virtual assistant can design the mailing, compile the mailing list, send the finished product and track your responses.
62. Scan your documents and images. Reduce your paper clutter, keep your important documents safer on computer media and transform your images into computer files that can be used for endless purposes.
61. Keep your business plan up to date. Changes to your marketing plan? Cash flow statements? Thinking of the possibility of expansion? Make sure your business plan reflects the changes to your business and your ideas. Your VA can make sure your business plan is always lender ready.
60. Write grants. Get your organization the funding it needs by having a virtual assistant write top notch grants.
59. Internet Marketing Assistance. Make sure your business presence on the Web is working for you. A VA can make sure that your website and business is getting Googled and more.
58. Obtain client/customer testimonials. Potential customers love to see testimonials. Your virtual assistant can contact current or former clients/customers and get glowing reviews for your business.
57. Proofread your manuscript. It always helps to have a second set of eyes with a keen knowledge of the written word. And if you like to dictate your manuscript, a virtual assistant can transcribe it too!
56. Credentialing and renewal of memberships, etc. Many professions require keeping your credentials up to date by providing up to date information about licensing etc. The same goes for professional memberships. Your VA can keep track of just when these items need to be updated and just what information they need to keep you in good standing.
55. Ordering your office supplies. No time to run to the office supply store? Not a problem if you let your virtual assistant order them for you.
54. Research, order and set up delivery of new equipment. Looking for a new laser printer? Does it need to do faxes too? A virtual assistant can find the right machine for the job, order it and coordinate delivery time with your schedule.
53. Tracking expenses. Just supply your VA with receipts and they can organize them into meaningful data via a spreadsheet. Your accountant will love you at tax time.
52. Translation. Do you need that document in Spanish? A multi-lingual VA can do that.
51. That special project that you never have time for. Have a brainstorm idea that you just know could make you a household word, but you can't find the time to work on it? Call your virtual assistant to get the ball rolling.

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50. Design your company newsletter. A company newsletter is a way to keep your business in the minds of clients, potential clients and associates. Whether you choose to send yours via e-mail or traditional snail mail, a virtual assistant can design yours to fit your company, complete with logo, company colors, etc.

49. Compile your newsletter on a monthly/quarterly/yearly basis. Now that you've got a great design, send your VA the material you want included and let them pull it together and mail it out for you at the interval you decide is right for your business.

48. Fill out that paperwork you never have time for. Registration forms, membership applications, whatever it is, your virtual assistant can fill out that paperwork and get it to the appropriate parties.

47. Review and edit your latest proposal. Want to make sure you've dotted your i's and crossed your t's in that proposal your getting ready to submit? Have your VA review and edit it for you to be sure it's letter perfect.

46. Write your next proposal. No time to even pull together the proposal? Work with your virtual assistant to provide the information they need to pull it together for you.

44. Make needed phone calls. You're voicemail box is overflowing with messages that need some sort of return phone call. Take care of the ones that require your response and let your virtual assistant take care of the rest.

43. Your own personal reminder service, never forget a birthday or anniversary again. Your VA can even order the flowers.

42. Make travel arrangements for your next business trip. Your virtual assistant can book the flight, the rental car and the room. They can even make dinner reservations or reserve tickets to that play or game you want to attend while you're there.

**41. Your own personal answering service while you're out of town.** It will give your customers/clients the personal interaction they crave and your VA can prioritize your messages so that you know which ones need immediate attention when you get home.

40. Essay review for your college bound senior. Who says a virtual assistant can only help with business tasks. Those college essays are important, have your virtual assistant review, critique and offer suggestions for changes for your student's college essay.

39. Data entry. Never enough time to get all that data into the appropriate program in order to utilize it. A VA can do that for you.

38. Create reports and spreadsheets from your data. Your VA can also organize the data into report or spreadsheet form customized to your specifications.

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37. **Write or update your business resume.** Whether you post it on your website, include it in your marketing packet or just have it on hand for those times when it is requested, an up to date business resume is a must. Allow your virtual assistant to help you put your best foot forward by keeping that resume fresh and shiny.
36. **Convert files into needed formats.** Your associate needs that document in .pdf format? That image file needs to be in .jpeg? Not a problem for your VA.
35. **Draft documents.** Have your virtual assistant draft your next letter, fax, contract or anything else you may need. They can also design document templates so that the things that you send out frequently don't have to be written from scratch every time.
34. **Research your competition.** Wondering if it's time to increase your prices? Or if your competition has jumped on the latest development bandwagon? Your VA can find out just what the competition is doing so that you can make informed decisions.
33. **Compare promotional materials and order the ones that are right for your business.** Should you offer pens, magnets or calendars with your business name imprinted on them? And where is the best, fastest and/or cheapest place to order them. Guess who can find out for you? That's right, your friendly virtual assistant.
32. **Design business forms.** Need employee information forms for those remote employees or perhaps client contact forms? A VA can design them for you, personalized with your company information and logo.
31. **Set up a chat room where you can conduct business meetings online with clients or remote employees.** Your virtual assistant can set you up in a secure chat room so that you can conduct that business meeting in your pajamas.
30. **Do the dreaded bookkeeping.** So the stack of receipts and bills are piling up on your desk because you hate the bookkeeping. Or maybe you just don't have the time. Let your VA do it for you.
29. **Prepare your payroll.** Are your remote employees complaining because they always have to remind you it's payday? Your virtual assistant can make sure everyone is paid on time, every time.
28. **Invoice clients/customers.** Your business would be in the black if you could just get those clients to pay you. Of course, they might if you had time to sit down and invoice them. Make sure your invoicing is timely by letting your virtual assistant do it.
27. **Make collection calls.** They're being invoiced on time, but they still aren't paying? Your VA can remind them of their obligation.

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26. **Set up payment arrangements for delinquent accounts.** Do you have clients that would like to make arrangements to pay that debt in installments, but you know you'd never be able to keep track of it properly. Allow your virtual assistant to set up arrangements and keep track of payments for you.

25. **Sorting through your massive load of e-mail.** Your virtual assistant can weed out the SPAM and prioritize your messages.

24. **Preparing correspondence.** Need a letter drafted to a potential client? A VA can take care of that for you, and then e-mail it for your review and personal touches.

23. **Mailing correspondence.** Do you have a large mailing list? Your virtual assistant can keep you from standing in long lines at the post office.

22. **Setting up your business blog.** Business blogs are becoming an important marketing tool, let your VA set one up for you.

21. **Maintaining and updating your business blog.** Don't have time to blog? Give your virtual assistant the ideas, let them draft the post and then you can review it and add your own 'voice' before publishing it.

20. **Design and maintain your website.** Don't have a business website yet? No problem, your VA can do that for you.

19. **Research software options for your business.** Looking for software to make your life easier but your head is spinning with all the choices out there? Let your virtual assistant research the options and put the results in a comparison chart that will make it easy to choose the right one.

18. **Designing and preparing marketing packets.** Wouldn't it be great to have a professional handout packet that introduced your company at the next meeting you have with a potential client? Or smaller packets that can be passed out at the next Business After Hours? Your VA can design and compile just what you need.

17. **Faxing.** Tired of waiting by the fax machine to make sure those multipage faxes have been received? A VA can take that tiresome task off your hands and provide confirmation sheets for those faxes.

16. **Submit your website to search engines.** The secret of making your website more than just a page on the web is traffic, the more traffic to your site, the more visibility and the bigger chance of it leading a new client or customer your way. A virtual assistant knows their way around the web and can submit your site to all the major search engines and then some.

15. **Submit articles and press releases.** Press releases and articles in local media can be a marketing dream. Get your name out there for free, have your VA submit press releases and articles to the local media market for you.

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14. **Submit insurance claims.** Is your profession in the medical field? Let a VA simplify your life by filing those pesky insurance claims for you.
13. **Provide medical coding.** Medical coding is required for proper payment when submitting claims, if you don't know the difference between a CPT and an ICD-9, there is a virtual assistant out there that does!
12. **Review denied insurance claims, analyze and determine requirements to resolve them.** Ok, so the insurance company denied a few of those claims you submitted. It can be time consuming and frustrating trying to figure out why and how to fix them. Wouldn't you rather leave that to your VA?
11. **Insurance verification.** Medical offices, escrow and mortgage companies are just a few fields that often need verification of certain types of insurance. A virtual assistant can handle that for you.
10. **Gather needed documentation for real estate closings.** Need a VOE, insurance binder, tax information or other documentation for closing? You can count on a virtual assistant to get the documents for you.
9. **Set up an online office space.** You're on the road and suddenly you realize you need a certain document. It's on your computer at the office and it's too late to go back now. If you have your virtual assistant set up a secure online space where you can upload important documents and information it is no longer a problem. You can use your handy PDA, Blackberry or any computer to access it easily.
8. **Schedule pick up of your packages for mailing.** Lots of packages to mail? A VA can set up a pickup date and time that is convenient for you with the company of your choice.
7. **Keeping your clients updated on their accounts/projects.** Clients and customers like to know that their account or project is important to you. Give them the satisfaction of knowing you're on task by letting your virtual assistant contact them with updates.
6. **Book a guest speaker.** Looking to inspire the audience at your next business luncheon or employee meeting? Your virtual assistant can find an inspirational speaker that fits the bill and book them for your meeting.
5. **Tenant screening and rental billing/collection.** Do you have rental property that is difficult to keep track of in addition to your business? Your VA will screen potential tenants, handle tenant calls and take care of your billing for you.
4. **Research and identify target markets.** Are you thinking it may be time to expand your business or offer new products or services? A virtual assistant can do the research for you leaving you to analyze the data and decide which way to go.

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3. **Send out thank you cards.** Feeling guilty about not sending out thank you cards for last year's holiday gifts? Don't let it happen again. That's right, your virtual assistant can let everyone know just how thankful you really are.

2. **Convert paper files to archive CD's.** Is the paper clutter overwhelming you, but you need access to it all? Wouldn't it be great if you could put it on an archive CD? You can. Or better yet, your virtual assistant can.

1. **Anything that you or an in-house employee can do.** Still wondering how you could use a virtual assistant? The answer is simple. A virtual assistant can do anything you or a 'conventional' employee can do. Don't let the fact that they are in a remote location concern you. In fact, that's one of the bonuses of using a virtual assistant. No overhead, no taxes, no insurance and no desk space needed.