

 Placeholder for Logo

 Last Reviewed: July 2025

Standard Operating Procedures (SOP)

Creeda VA BPO LLC

Glossary of terms

VA- Virtual Assistant

QA-Quality Assurance

P&C- Property and casualty insurance

PIP- Performance Improvement Plan

Creeda VA BPO- Creeda VA BPO LLC

KPI- Key Performance Metric

CRM- Customer Relationship Management System

General Information

EthosVAS

Mission Statement

Our vision is to make time available for owners by providing the highest quality VAs to enhance any business.

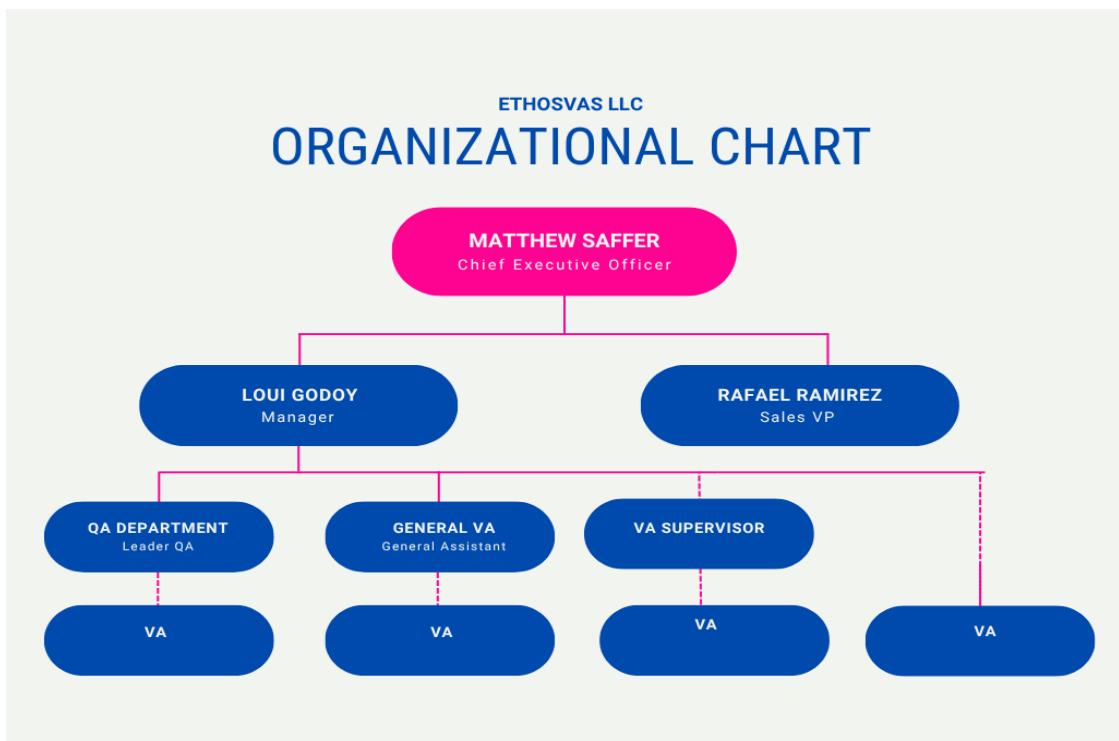
Vision Statement

"Be the best, do the best"

Core Values

- Honesty
- Integrity
- can -do- attitude
- Team work
- Clear and open communication
- Continuous learning

Creeda VA BPO LLC Organizational Chart



EthosVAS

Notes

This general SOP is subject to the approval and sign off of the Creeda VA BPO CEO.

ALL manuals should be subject to semi-annual review.

Recruitment

Introduction

This Creeda VA BPO manual on recruitment attempts to create an organizational document that outlines the standardized policies, procedures, and best practices for attracting, screening, interviewing, selecting, and onboarding new employees. It serves as a comprehensive guide for everyone involved in the hiring process, from hiring managers and HR professionals to interviewers and even potential candidates.

Scope: The primary purpose of this recruitment manual is to ensure consistency, fairness, and efficiency throughout the entire talent acquisition lifecycle. It should be viewed as open and impartial in the hiring process. Creeda VA BPO is an equal opportunity employer.

The Recruitment Process

Background considerations

Each VA being hired by Creeda VA BPO needs to adhere to the following specifications:

- 18 years or older, preferably 20 years old or older with experience in insurance.
- A quiet environment to work from home.
- Working headset.
- Computer with a minimum of 8gbs of ram and processor no older than 5 years.
- Some form of back up communication.
- Provide a resume with references.
- VA should have an accentless to near accentless English speaking voice with clear intonation and vocabulary.
- **ALWAYS** check the Do not hire list before interviewing an applicant.
- VA job descriptions are purposely vague and limited to roles needed to be filled at the moment.
- A good candidate can be signed up and placed in a moodle classroom awaiting placement, even if no client is available.

Sourcing

- Flyers are created with clear Creeda VA BPO branding and logos.
- Flyers/Ads are placed on Facebook job boards, linkedin or by referral. Employees who refer candidates and are successfully placed and onboarded are given a bonus of USD 25.00 per VA.
- Each job ad has a paragraph which directs potential candidates to a google form link where they can fill it out with their personal information including screenshots of internet speed tests.
- They also need to send in their resume to the specified email.

Candidate Management

- Preference is given to candidates who actually email in their resumes.
- The google form provides the initial screening test. They need to complete it to move forward.
- The basic criteria for VA's are what experience do they have? Can they write in English effectively? Do they have the required equipment? Are they currently employed? Are they bilingual? Do they have an easy way to get in contact with them?

Initial Interview

- All candidates who appear promising are reached out via whatsapp. An initial call is scheduled.
- This call should follow a basic interview format. So how are they doing? Where do they live? What experience do they have?
- This is used to gauge their English speaking level and to verify they live in an area with low connectivity issues. For Belize, good candidates come from the urban areas of Corozal, Orange Walk, Belize and Cayo districts. The Dangriga and Toledo districts have connectivity issues due to remoteness and general lower education levels. Avoid hiring people from here if possible.
- Any VA that passes the initial interview, they need to provide a voice sample (this can be any script) and confirmation of their computer specs via a screen shot of their settings.

Second Interview and offer

- Schedule a second interview.
- This should be conducted by someone who did not do the initial interview.
- Criteria for this is more in depth questions regarding their goals and challenges they have experienced. This process will generally yield the basic overview of the candidate.
- The VA should also meet someone like the CEO or VP, to finish the screening process.
- Following this, an offer is made where the employment agreement is clearly explained and the compensation offer is made.
- They are then moved to onboarding and training.

Metrics and Continuous Improvement

- The hiring process should yield some key metrics like what's the average time to hire a new VA, what's the quality of each VA, and how well do they perform with a client.
- The reports should be compared to industry standards.
- Problems should be identified and solutions provided.
- New hires **SHOULD** be given the ability to review the hiring process.
- The recruitment process should be reviewed every 6 months.

Onboarding

Introduction

The onboarding process at Creeda VA BPO aims to integrate new employees into the organization, its culture, and their new role. It goes beyond mere orientation or paperwork, encompassing a series of planned activities designed to help new hires quickly become productive, engaged, and long-term contributors. Effective onboarding provides new employees with the necessary knowledge, skills, and social connections to thrive, ultimately leading to higher job satisfaction, reduced turnover, and faster assimilation into the team and company environment.

Scope: The scope of onboarding is ensuring legal compliance, making the VA understand his/her role, and general orientation.

The Onboarding process

Introduction to Creeda VA BPO

- The first steps needed is that the VA needs to sign the Creeda VA BPO Independent Contractor's agreement and SOP for VAs. These are templates and are saved in the zoho signing tool.
- During this introduction, the VA needs to understand what they are signing and give a clear deadline for signing the documents.
- The VA should also be given a short introduction to the values and culture of Creeda VA BPO.
- The VA should be given a clear set of roles and responsibilities for their position.
- They should also be placed into the moodle classroom for preliminary training or screening depending on how urgently a new VA is required.

Technology set up and Orientation

- Each VA needs to have access to the relevant login credentials for all platforms. This includes emails, CRM, communication tools etc. Onboarding agents **MUST** verify that the VA has access to the above.
- In general, **ALL** VAs should have a VPN and they should have a work user on their personal devices that separates their work profile from their work profile.
- In terms of Orientation, each VA should be given a general walk through of all technologies used.

- VA's should be given video tutorials or reference guides for how to use each tool efficiently.

Orientation

- VA should understand where they fall under in the Organizational Structure.
- VA should be given an overview of team communication tools (Discord), explanation of work flows and introduction to key team members and clients.
- They need to be given comprehensive training on their responsibilities.
- Role playing and scenario based learning.
- **ALL** next steps need to be explained clearly to the VAs, they should be moving into training.
- Onboarding Agents should document all interactions with the VA and provide a short report on what areas they excelled at and where they can improve.

Metrics and Continuous Improvement

- VA should be given the opportunity to evaluate the onboarding process.
- Onboarding should take no more than one (1) day.
- The onboarding process needs to be evaluated periodically and reports made about which VA's were retained post onboarding.

Training

Introduction

The Creeda VA BPO training manual is a vital resource designed to equip individuals with the knowledge, skills, and procedures necessary to perform specific tasks or roles effectively within the organization. It serves as a structured guide, providing clear instructions, best practices, and essential information to facilitate learning, standardize operations, and ensure consistent quality and performance. More than just a collection of instructions, it's a foundational tool for skill development, compliance, and fostering a confident and capable workforce.

Scope: Equip incoming VAs with the skills and knowledge needed to carry out their duties effectively.

Preliminary Training

- Each VA should complete the English and general insurance terms training on moodle.
- Depending on what role they are chosen for training follows along with that.
- At Creeda VA BPO we are currently equipped to train and launch VAs in the following areas:
Insurance VA's with a concentration in ACA, First Enroll, 3 way calls, billings, general book servicing, VA's in property and casualty insurance including quoting and retention. General VAs in sales, appointment setting, executive VAs, and to a smaller degree legal VAs.
- A specialist VA will go through the moodle training in ACA and first Enroll.
- The grades achieved by the VA will give an indication of their strengths and weaknesses.

Introduction to Creeda VA BPO

- Trainers are expected to reiterate what Creeda VA BPO is, its values and culture. The VA is to understand where they fit in as part of Creeda VA BPO and as a VA working directly with a client.
- Provide an in-depth overview of the VAs roles and responsibilities.
- Explain what are the generally accepted behaviours and what constitutes professionalism. Specifically, how to communicate within the team and clients.
- They should understand their work shifts and general KPIs.

Training (Essential)

- Training is conducted by 2 people. One provides the general and specialized training, the other verifies the training.
- All training should take a minimum of 3-5 days depending on what responsibilities the VA will have.

- There needs to be a clear scope of work for the VAs.
- The general trainer will start by walking them through what insurance is or what their role is.
- They then review the technology provided by the client.
- They are expected to do one on one training, scenario building and role playing.
- At the end of each section, a test is administered to the VA.
- At least twice during the training period, the specialized trainer is expected to quiz and give pointers to the VAs.
- All VAs must understand the basics of customer services including active listening, Empathy and rapport, clear and concise communication, conflict resolution and time management.

Training Product Specific

- Depending on the VAs role, they can expect training on Health sherpa, Firstenroll or client centric CRM.
- They will also be given commonly asked questions and answers.
- Access to a knowledge base and how to use it. Be clear that the knowledge base is a living document and can change regularly based on new information.
- They will be made to understand the structure of the clients company and who they can contact with issues.
- Specific training on computer systems and dialers.
- Policies and procedures which are the scripts and general guidelines for dealing with customers and documenting interactions.

Quality Assurance and Performance

- Each VA needs to understand what the QA score card looks like and how they can lose/gain points.
- What performance improvement plans mean.
- What they can expect from coaching sessions with a supervisor.

Metrics and Continuous Improvement

- VAs should understand that training is continuous and they can expect more modules added.
- VA should be given the opportunity to rate the training process.
- The training process should be evaluated regularly and improved based on client and VA feedback.

Quality Assurance

Introduction

Quality Assurance (QA) is a systematic process designed to ensure that customer interactions consistently meet predefined standards of quality, professionalism, and efficiency. It plays a crucial role in enhancing customer satisfaction, improving agent performance, and aligning customer service with overall business goals.

At its core, call QA involves monitoring and evaluating customer interactions—whether they are phone calls, emails, live chats, or social media messages. This evaluation is typically done against a set of established criteria or a "scorecard" that assesses various aspects of the interaction, such as:

Agent soft skills: Empathy, active listening, tone of voice, professionalism, and clear communication.

Adherence to procedures and compliance: Following scripts, company policies, and regulatory requirements (e.g., data protection).

Problem-solving and resolution: The agent's ability to effectively understand and resolve customer issues, ideally on the first contact.

Call handling efficiency: Average handle time and overall productivity.

QA at Creeda VA BPO

Scope: The scope of QA is defined by each Client, however there needs to be clearly defined Key Performance Metrics which can include handle time, how many calls a day and scripted responses.

Define Goals and Standards

- Have a general meeting with the Client and review their stated goals. Have a follow up meeting if necessary to understand what exactly is their product and what they view as success.
- Identify each KIP including agent performance, efficiency, and compliance.
- Receive **WRITTEN** confirmation from client stating what are the KPIs and that Creeda VA BPO should move forward including providing an admin account for call recordings.
- Predefine how much access a client can have to the QA reports.
- Define a QA score card specifically to make it actionable and have qualitative data.
- Create a google form with the QA score card.

- Create a report format to document each QA interaction.

Monitoring and Evaluation

- Ensure Admin privileges have been granted for the back end processes.
- Confirm what dialer is being used and that QA is properly trained on the platforms being used by the Client. If Agent is not an on-call agent, confirm there is a database set up to track agents inputs.
- Define a sampling strategy, this is dependent on clients but generally calls should be randomly sampled no less than 12 per week, preferably at the beginning of the work week, middle of the work week and end of the work week. Use the same basic set up for agents not on call.
- Calls should be monitored both recorded and on live calls.
- New agents **NEED** to be monitored daily.
- Use score cards in google forms to grade each call and create reports for each agent.
- If an agent is seriously underperforming, **IMMEDIATELY** report to supervisor for coaching or removal from team.

Feedback and Coaching

- All agents are to receive feedback and coaching a minimum of once a week.
- Each session follows this format: Presentation of score card, Agent is allowed to give his/her feedback and supervisor provides pointers, personalized coaching session and refers them for more training if needed.
- The agent has to sign off on score card report, they have to take ownership of the results of the score card.

Standardize and Analyze Data

- The QA team must meet a minimum of once a month to review the effectiveness of the score card methodology.
- Use data from the score cards to track performance trends.
- Generate reports that summarize and highlight what is happening in the team, what are the challenges and what potential solutions can be implemented.
- Do root cause analysis for recurring issues and how they can be mitigated.

Continuous Improvement

- QA is not linear, it is cyclical meaning improvement is always possible.
- Make actionable plans based on insights gathered from reports.
- Monitor impact of changes.
- Make excellence part of the culture of the QA team. QA is made for development not to punish agents.

Client Success

Introduction

Creeda VA BPO Client Success Management (CSM) is a business methodology and a proactive approach focused on ensuring that customers achieve their desired outcomes while using a company's products or services. Unlike traditional customer service, which is often reactive and problem-focused, client success is about building long-term, mutually beneficial relationships. The ultimate goal is to make the client as successful as possible, which in turn leads to increased customer loyalty, retention, and growth for the business.

Scope: Understand the client's needs and proactively address them. Build a long term relationship based on mutual trust and respect.

Define Goals and Objectives

- Client Success Manager meets the client 2 times before VA is launched.
- CSM is to get a hands-on approach on what exactly the client needs and his/her expectation.
- Create a road map for roles and responsibilities.
- Follow up with the client to sign off on every aspect of the new VAs role.

Use value template

- Use a project scope template that clearly identifies every issue and need the client has.
- **ENSURE** client signs off on project scope and if anything changes, the client has to request that in writing.

Constant Outreach

- During the first couple of weeks of client onboarding CSM should be in daily contact with the client.
- Following that, biweekly contact with clients to ensure VA is operating up to par will suffice.
- Any and all issues should be addressed immediately.
- Client should fill out a performance review sheet for the VA monthly.

Evaluation and Continuous Improvement

- Client should be given the opportunity to review the CSM onboarding process.
- Process should be reviewed semi-annually.

- Reports need to be generated to identify problems and potential solutions.

Human Resource Management

Introduction

Creeda VA BPO Human Resource Management (HRM) is focused on a strategic approach to managing an organization's workforce to maximize productivity, employee satisfaction, and business success. It encompasses the development, retention, and optimization of employees to align with organizational goals.

Scope: Be the point of contact between VAs and management to provide the most optimal solutions.

General HRM at Creeda VA BPO

- Employees are allowed 2 sick days and 1 personal day per quarter.
- For personal days they need to provide 1 weeks notice sent via official email.
- Employees are to check in everyday during stand up and the start of their shifts.
- They are to use time dr for time tracking.
- For the first year employees are expected to receive 4 performance reviews.
- The reviews are based on their performance including sick days and general professionalism along with feedback from the clients.
- If all reviews are successful VA can end up making \$750 USD at the end of year 1.
- After the first year, VA should move to an annual review where raises are equal to 5% of their base salary.
- VAs are aware by signing the VA SOP what is expected of them and under what grounds they can be terminated.
- Each VA is expected to meet with GM once a month.
- Supervisors are to meet with GM once a week.

Employee Files

- All employees provide a government issued ID, banking information and W8 form.
- This is saved into a personnel file that is stored on the google drive according to Creeda VA BPO's Data policy.

Employee Payroll

- Employees are paid in accordance with the Creeda VA BPO Salary structure.
- Their pay is calculated based on daily attendance, time dr and absences.
- Payroll is calculated and submitted to Creeda VA BPO's head office 5 business days before payment for review.
- Once the payment is approved it is disbursed to Belize where it is paid out from the Belize based bank account.

Public Image and Marketing

Introduction: Our North Star

Welcome to the Creeda VA BPO Public Image and Marketing Manual. This document is our "North Star" for communication. Its purpose is to ensure that every time we present ourselves to the world—whether through a social media post, a sales presentation, a press release, or a product package—we do so with a consistent, powerful, and authentic voice.

A strong brand is built on trust, and trust is built on consistency. This manual is the practical tool that empowers every employee, partner, and contractor to represent Creeda VA BPO accurately and effectively. Adhering to these guidelines protects our reputation, enhances our visibility, and drives our success.

- Logos
- Color Palettes
- Pitch deck
- Imagery and Photography style (bright and pink)
- Digital Marketing
- Social media Policy-Do's and don'ts
- Contact Person for Public Image
- Crisis Communication Plan

Data Policy

Company Data Policy

1. Purpose

This policy outlines how Creeda VA BPO collects, uses, stores, and protects data to ensure compliance with laws (e.g., GDPR, CCPA) and maintain trust with customers, employees, and partners.

2. Data Collection

Only collect data necessary for business operations (e.g., customer orders, employee records).

Obtain explicit consent when required (e.g., marketing emails).

Clearly explain why data is being collected (via privacy notices).

3. Data Usage

Use data only for its intended purpose (e.g., processing orders, improving services).

Do not share or sell data to third parties without consent, unless legally required.

4. Data Storage & Security

Store data securely (e.g., encrypted databases, password-protected files).

Limit access to authorized personnel only.

Retain data only as long as necessary; delete outdated records safely.

5. Employee Responsibilities

Follow company security protocols (e.g., strong passwords, locked screens).

Report data breaches or suspicious activity immediately.

Never access or share data without authorization.

6. Customer & Employee Rights

Individuals may request access, correction, or deletion of their personal data.

Requests will be addressed within [X] business days.

7. Consequences for Violations

Unauthorized data access/sharing may result in disciplinary action, termination, or legal consequences.

8. Policy Updates

This policy may be updated periodically; changes will be communicated to all stakeholders.

Risk Assessment and Mitigation

