

# How to Outsource a Virtual Assistant?

Outsourcing a Virtual Assistant is the best option to free up your valuable time and let professional experts take charge of all the time-guzzling tasks. This handy guide leads you step-by-step through the entire process of how to leverage this exciting business opportunity.

By Team VE

Guide How to Outsource a Virtual Assistant?

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Need to Know



What to Do



## Key Points

# Need to Know

When the clock struck 9pm on Friday night, 39-year-old Chris looked up from his desk and grimaced. This whole week had been crushing. His small recruitment agency was growing, and he had never managed to leave his office before 10pm. As usual, his four-year old daughter must have gone to bed without hearing the promised bedtime story. He rubbed his tight neck muscles. This had to stop. He needed an assistant. And, fast.

Sounds like the story of your life, dear entrepreneur?

If yes, then, this guide is just what you need to turn your business and your life around.

In this all-encompassing guide, I am going to talk about how you can [hire a Virtual Assistant](#), why you need one (although, no rocket science here), where to find one and how to ensure it is one of the smartest business move you have made.

As the name suggests, a Virtual Assistant is someone who takes all of the tiresome, tedious tasks off your hands and does them himself or herself quickly, efficiently (not that you can't, but you know what I mean) and professionally. Leaving you free to do what you always wanted to – grow your business.

Hiring locally is, of course, the first thing you think of. But, a little searching and several phone calls and emails later, you probably realize that it is not as easy as you thought it was going to be. The salaries could be beyond budget, they may not be ready to work the graveyard shift, the skills may be lacking, and so on.

Enter [remote hiring](#). I won't call it outsourcing, because, thanks to the pandemic, the whole world has gone remote (yes, it's now a hybrid model, but the remote working model is here to stay). Why limit yourself geographically when you have the world to choose from?

Hiring a remote virtual assistant instantly achieves two things: one, the costs come down dramatically; and, two, you can now handpick from a vast talent pool and be spoilt for choice.

A win-win situation all around. Or, is it?

Remote staff or resources are available everywhere online. Freelancing websites, established and the newbies, promise the cheapest options. But, my advice would be – don't fall for the trap of low costs. It doesn't always equate with quality. And, what you need is a quality player, a dependable and trusted vendor who will always have your back, no matter what.

So, here's the Smart Entrepreneur's Guide to Outsourcing and Hiring a Virtual Assistant.  
**What to Do**

### A. Chuck Out All Assumptions

First, chuck all assumptions out of the window.

And...also, let's get the typical deciding factor out of the way.

Cost.

If you hinge all outsourcing decisions on the cost factor, then be prepared to be disappointed and let down.

Yes, India is a far cheaper destination than the US or the UK.

Yes, skills are available in plenty and extremely affordable.

But, it is a heavily saturated market with every vendor trying to woo you with the one handy differentiator – cost.

The really reputed and well-established companies never go down that rabbit hole.

They compete on quality, on timely delivery, on strong communication, on transparency.

### B. Focus on three key areas:

- Know types of Virtual Assistants
- Things to look for in an outsourcing vendor
- Things to prepare while outsourcing a Virtual Assistant

Let's dive in.

#### I. Types of Virtual Assistants

Search on the types of VAs

When you get down to the basics, there are more than one kind of a VA available for hire.

While a generic VA fits most requirements, if you happen to be in a very niche industry, then you are better off looking for VAs who boast proficiency in those domains.

For instance, a [real estate VA](#) would know how to create listings, be familiar with the real estate 'language', find property details, do [data entry and management](#), cold calling and lead generation activities.

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Here are the various types of tasks for which you can remotely hire VAs:

### **Personal Tasks**

- Email management
- Calendar management
- Organizing your work schedule
- Appointment setting
- Hotel reservations
- Booking flights/ trains/ cars

### **Real Estate Support**

- Posting MLS data on websites
- Uploading your listings to real estate platforms
- Managing and reviewing photos for your MLS listings
- Creating a virtual tour for prospective buyers

### **Content Writing**

- Writing blogs and articles
- Writing social media posts
- Writing landing pages
- Writing product descriptions

### **Social Media Management**

- Run successful social media campaigns for you
- Write and post for you on a daily basis
- Do YouTube optimization

- Manage your social media platforms

## Data Management

- Database building
- Data entry
- Data conversions

## Data Presentations

- Making Power Point presentations
- Company budget presentations
- Research data presentations

## Email Management

- Manage/ filter all your email correspondence
- Compose and reply to your emails
- Setting up Autoresponders

## Social Tasks

- Event coordination
- Set up social media accounts
- Vendor management

## Travel Research

- Finding & booking flight schedules
- Comparing offers, prices
- Researching hotels & destinations
- Mapping out trip itineraries

## Administrative Assistance

- Booking appointments with clients
- File management (organizing files using Dropbox, etc)
- Creating basic reports (reports on weekly tasks, deliverables, sales)

## Customer Support

- Online customer service (email, chat, social media)

- Offline customer service (inbound/outbound phone)
- Follow-up with potential customers

## Transcription

- Legal
- Medical
- Financial
- Any other voicemail, video or audio, podcasts, etc.

## Bookkeeping & Accounting

- Compute, classify and record all numerical data
- Prepare general ledgers and invoices
- Process accounts payable & receivable transactions

## Online Research

- Market research
- Legal research
- Academic research

## Digital Marketing

- Help you rank on page one of search engines
- Attract more traffic to your website
- Increase engagement and page sessions
- Convert visitors into loyal customers
- Implement SEO best practices

## Research on the destination

Survey after survey, year after year, has thrown up one name consistently when it comes to the #1 outsourcing destination – India. There are other players in this field, like the Philippines, Malaysia, Bangladesh, but the overall combination of all factors is what makes India the most preferred and attractive destination for outsourcing. India is also the second largest English-speaking nation in the world, just behind US.

## Need to Know

Why India:

- 6.5 million annual graduates from Indian Universities each year
- Over 2,000 engineering colleges produce  $\frac{1}{2}$  million engineering students annually
- 300,000 annual post graduates
- 10 million join pre-graduate degree courses per year
- 19 million students enrol in Universities annually
- 750 multinational corporations have R & D centres in India, employing 400,000 professionals
- 85 percent of Fortune 500 companies prefer India for outsourcing their software development

### **Research on the vendor types**

Merely finalizing the destination is not enough though. You also need to identify the type of outsourcing company that best suits your need.

#### **Need to Know**

So, there are three types of outsourcing options:

1. Project outsourcing companies
2. Remote staffing companies
3. Freelancers

#### **1. Project outsourcing companies**

These are large, well-established organizations that usually don't work with solopreneurs or even Small and Medium Businesses (SMBs). Their clients are mostly large multinational corporations and the volume of outsourced work is also huge and often lasts for years.

#### **2. Remote staffing companies**

These companies provide dedicated remote staff to work for their global clients just like an inhouse resource. Such outsourcing companies are ideal for solopreneurs and SMBs, who want a more cosy, one-on-one relationship with their outsourced partners and remote employees.

#### **3. Freelancers**

No introduction needed here. These are individuals who work for multiple clients, usually in their homes, and are basically lone players. The security and data protection of the

outsourced work can be circumspect as can the delivery and quality since there is no supervision or monitoring involved.

You need to be very clear about which option best suits your requirements and budget.

This also depends upon the next factor.

### **How involved do you wish to be?**

This is a key factor that can influence your choice of vendor. Do you want the outsourcing partner to take over fully while you just send the task and await the results in the mutually agreed stipulated time? Or do you want to know exactly what is happening on a very regular basis?

### **Need to Know**

1. If you are a very busy CEO, wearing multiple hats and just wish to offload some of those tedious, repetitive tasks to someone who can do it better and faster, then go for a project outsourcing company. With such vendors, your headache is over the moment you send across the tasks and the requirements. The vendor's teams work on your project and send you the finished tasks as per the agreed timelines.
2. If, however, you have very regular, ongoing daily tasks, then its best to hire a dedicated VA from a remote staffing company. This VA will work exclusively for you, like an in-house resource and you will enjoy total control over your work and resource.
3. If you don't want to be too involved and budget is also a constraint, and the task is not high-end work, then hiring a freelancer could work as they come much cheaper than the first two options. But the quality of work and timely delivery could be circumspect as freelancers have been known to jump ship if a better opportunity came along. If you hire freelancers from reputed websites, it could work but even then you have to rely on your own judgment to pick the most reliable ones from the massive databases. It could work, it could go south.

### **Things to Look for in an Outsourcing Vendor**

So, if you are a solopreneur or an SMB, then choosing the right outsourcing vendor is half the battle won. An incompatible outsourcing partner can actually turn the entire experience into a less than rewarding one.

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## Check the pedigree

How many years in business has this vendor been? 1 year, 2 years, 14 years? If they've lasted that long, they've got to be doing something right, right?

## Check the client testimonials

Well-established remote staffing companies have an impressive line-up of client testimonials and the real top-notch ones have a ton of video testimonials too. Real names, real companies.

## Check their expertise

What is their staff strength, number of offices, domains covered? Certifications, awards, recognition – everything matter.

## Check the About Us and Contact pages

Fly-by-night vendors usually have a very generic About Us section. No images of the directors, the CEO, top management or employees.

The Contact Us page holds the key to authenticity and credibility. Is there a vague physical location with no actual details, just a Gmail email address and no telephone numbers? That's a huge red flag!

## Check for actual site images

Reputed virtual staffing companies are proud to show their offices, infrastructure, client onsite visits and company culture and activities. It is a vital part of their ecosystem.

## Check their response time

How quickly are your queries being answered? Are they offering support 24x7?

Once you have shortlisted a few suitable offshore companies, the next step is to know how to hire a Virtual Assistant from them.

# Things to prepare while outsourcing a Virtual Assistant

## Setting the right expectations



**First things first. Outsourcing is not a magic pill.** Be very clear in what your end business goal is by outsourcing a VA. What do you hope to accomplish at the end of the process? Have realistic expectations though. Here are some tips to help you get the maximum benefit from this exciting business opportunity.

## **Need to know**

### **Step 1: List out the tasks you want to outsource**

Clarity is key to success here. Avoid creating a haphazard bunch of tasks you think should be outsourced to a VA. Set aside time and start documenting all the processes, tasks and responsibilities that you plan to delegate to your Virtual Assistant. If there are some tasks that you are already doing yourself but which are also gobbling up a lot of your time, then these are obvious contenders for outsourcing. But, to ensure the transition is seamless and the difference barely perceptible, make sure you create training documents (or Standard Operating Procedures) for these tasks. For specialist and niche tasks, focus on the outcomes you want them to accomplish rather than just a set of specific tasks or procedures.

### **Step 2: Be crystal clear in your job description**

Next, be very clear and detailed in the job description that you plan to share with the chosen outsourcing vendor. Many times clients send vague job descriptions, often just a couple of lines. This mismatch between the real requirement and the job description not just wastes time for the recruitment team who have to rely on general profiles but also does not help meet the actual client needs. Specialist skills need specific details while the generic VA profiles can get by with an overall general outline.

So, what should your job description include?

- Explain your business (your industry, what you sell, and who your target clients/customers are)
- What is the level of education, expertise, and experience required?
- What is your VA expected to do – duties and responsibilities?
- Do they need expertise in any apps, tools, or software?

### **Step 3: Give your handpicked candidates a ‘patch test’**

Once you have zeroed in a few good candidates, don’t jump straightaway into hiring them. No matter how good a candidate appears on paper, always try them out before you commit

to hiring. All reputed outsourcing companies always offer a free trial instead of compelling you to hire straightaway. In the free trial, you can assign any task to complete as a test. Ideally, choose a task that they would be doing on a regular, ongoing basis to see how they fare at it. That way, you'll be spared any nasty surprises after you have hired.

## Step 4: Be proactive in your feedback

Once you have hired the desirable VA(s), don't just sit back and expect things to automatically fall in place. Both, you and your VA, need some time to get comfortable with each other, discuss how the tasks should be accomplished, fix targets and deadlines and so on. After that, once the process is well under way, continue to be proactive and regular in your feedback so that any issue or problem gets nipped right in the bud.

## Key Points

Let's have a quick recap of the Key Points:

1. Chuck all assumptions out of the window
2. Choose the outsourcing vendor wisely
3. Don't make the cost the only selection criterion
4. Be very clear in your job description
5. Keep in mind your business type and size

## Concluding thoughts

Outsourcing a Virtual Assistant could be the best business decision ever. But, only if you do it right. Having an expert professional take care of the routine, tedious stuff for you can really work wonders for your morale, and enthusiasm levels as you now have more time and energy to put back into your business.

Look forward to restful weekends and vacations while staying in the loop for any unprecedented emergencies.

**But, again, let's reiterate. Don't make the cost the selection criteria. Go for the best.**

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