**System to Hire VA’s**

* **Identify and create initial tasks**
* **Place ad and screen candidates**
* **Set up communications abilities**
* **Training and Management**
* **Compensation**
* **Duplication**

Hiring VA’s can be an incredible opportunity of leverage to support productivity, increase productivity and control your expenses - if done right. Our team has been hiring and employing Virtual Assistants of many types and skill levels for over 7 years. Managing teams working support and administrative roles, to marketing and design roles to telemarketing roles. There is a specific process to set yourself up for success from those that have mastered this process before you.

**Identify and create initial Tasks** – To get started you first want to identify a need within your business that can be delegated. This can be taking administrative tasks off of your own plate, adding forms of telemarketing, or expanding your core staff’s current work capacity by leveraging a VA for a majority of their repetitive tasks on a daily/weekly basis allowing them to have more time to work at a higher level.

* **Step 1** -- Identify the task. Example would be an online marketing assistant, a data entry assistant, an inside sales caller.
* **Step 2** -- Create a list of the initial 5-10 tasks that you would start the new hire out doing. You want this ready to go before even looking to hire someone. Remember, it is not effective to teach someone everything all at once. If you want them to succeed, not make mistakes and not get overwhelmed, train them on the first 5 tasks they will be doing for you. Once they have those down fluently in a couple of weeks, add another 5 tasks to their workload. When they have those 10 down fluently after another couple of weeks you can continue to expand as needed per their workload and capacity by adding a new task a week or a few tasks a week, or as needed. Because you have everything documented – you have a system that can be trained, re-placed and re-created immediately on demand. Each task should be extremely detailed with a step-by-step outline to complete that exact task.
* **Step 3** – Create the workflow. What tasks get done when. Daily, weekly, monthly. First thing each morning, before the workday is done, etc.
* **Step 4** – Create work schedule. What days of the week? What times? What time zone? When are breaks/lunch?
* **Step 5** – Establish compensation. Based on the type of role and positions we will cover this one on one.

**Place ad and screen candidates** – Now you are ready to get your first hire!

* **Step 1** – Go to:<https://www.onlinejobs.ph/>
  + This site is a fantastic platform that allows you to recruit and hire on your terms. You are hiring a direct employee/contractor
  + You have the option to either shop resumes of candidates looking for work, or post a job ad and wait for the applicants to apply
* **Step 2** – Go to “Post a Job” at the top
  + Create an account to get started – Click Register
  + Next enter the job position information
  + Click Submit For Review
* **Step 3** – Interested Candidate Resumes will come directly to your email and through your login
  + Screen candidate resumes for experience in your specific job position
  + Keep in mind – many VA’s are fluent working for large and small US companies. Doing administrative work, telemarketing work, real estate specific work for years. You want to look for experience, working US hours, and reliability
  + Once you select the candidates to interview – set up a one-on-one SKYPE interview
  + Interview them just like you would an in-house staff member
  + If it will be a consumer facing position (on the phones) screen for very clear English and very clear phone connection
  + You will also be screening for strong internet connectivity during the interview process
* **Step 4** – Negotiate a salary, working hours, expectations and set a start date!

**Set up communications abilities** – Now that you have your first hire – you need to set them up to be able to communicate effectively with you, your team and your clientele. An administrative role will be easier. However, a consumer facing VA will need phone lines and a local caller ID, in most cases.

* **Step 1 –** We are all about simple. For many positions you can use SKYPE for pretty much all internal communications. Skype allows for instant messaging, direct calling, share screens, group chats, even outbound calling capabilities. Skype is a must for day-to-day communications. I have Skype running all day and communicate with all of our virtual staff through this platform throughout the day.
* **Step 2** – To set up outbound calling needs for inside sales callers you have multiple options. These are a few that we suggest:
  + Use dialer/call system built into your data providers: Mojo, Redx, Vulcan7, etc
  + Set up Zoiper Softphone – Zoiper.com
  + Google Voice
  + Voip.ms
* **Step 3** – Set up caller ID as a local number. Built in to most of these platforms above
* **Step 4** – Create a company email address – if will be consumer facing
* **Step 5** – Set up a VPN for secure access from their overseas computer to your tools and websites.There are many options for this service:<https://nordvpn.com/>

**Training and Management** – The 2 hardest parts in hiring staff (especially virtual staff) is first the training and second is the management. Getting your VA started correctly is imperative. There are differences between a virtual admin and a virtual inside sales caller. Either way you want to ensure proper training and management for their success and longevity in the position.

* **Best practices for an Admin:**
  + **Step 1** –Assign the first 5 tasks. You can share screens over Skype. Walk them through the first task while sharing your screen. Then, flip the share screens to them and have them perform the same task with you watching. Then let them get to work while leaving their screen share open on your monitor. This allows you to glance and oversee how they are doing. As well as they can chime in anytime over messenger to ask questions or if they get stuck.
  + **Step 2** -- Repeat this process for each task. Spend the time training now to never have to do the work yourself again.
  + **Step 3 –** Train with a heavy emphasis on culture and customer service. How you expect your team to communicate to one another and to the consumer. Importance of timely responses, etc. Same as you would train an in-person staff member to service your clients.
  + **Step 4** – Suggest having a morning rally to start the day, cover any important topics and jobs to attend to discuss challenges/solutions. Critical to make them feel part of your team and work with them as you would with any staff. Easy to do over Skype.
  + **Step 5** – Make sure they send a daily report at end of shift that includes all work completed for the day and any updated reports they are responsible for
* **Best practices for an Inside Sales caller:**
  + **Step 1** – Start each morning with a daily role play practice. This is a must. It will take time to learn the scripts and get really good at them. This will keep you sharp as well. Must be a minimum of 30 minutes every day**.**
  + **Step 2** – Common scripts you will be working on
    - Appointment setting script
    - Appointment confirmation script
    - Objection Handlers
    - Power closes
    - Lead follow up script
    - Follow up with non-attended appointments script
    - Invitation to events script
  + **Step 3** – Following morning role play rally with objective for the day. Should have goals highlighted and any specific direction and focus
  + **Step 4** – Make sure they send a daily report at end of shift that includes all call metrics for the day and any updated reports they are responsible for
    - Example of daily call metrics:
      * Hour’s prospecting
      * Contacts
      * Appointments set
      * Appointments showed
      * Contracts signed
    - Example Report would be:
      * An ongoing live Smartsheets or Google docs that accumulates their ongoing metrics from each day to collect averages and predictable measurements
      * An ongoing live Smartsheets or Google docs that tracks all hires or contracts signed. Including date signed, the source, previous 12 months sales volume, bonus amount, etc
      * An ongoing live Smartsheets or Google docs with all attended appointments compiled – trust me you will want this
      * A CRM system is ideal, that they update their notes, and all follow up attempts and communication with every candidate / same with you
  + **Step 5** – It is important to keep anyone in a sales role highly motivated.
    - Set incentives and contests to hit with extra bonuses.
    - Keep them informed throughout on progress with strong candidates that had great interviews or gave verbal commitments to sign
    - Keep them hungry and excited about their bonus earnings coming up and potential
* **Set Expectations from the beginning**
  + For an inside sales position in general (can vary based on what exactly they are calling on) you should expect a minimum of 150+ dials per day, 30+ contacts per day, 2 appointments set per day or 10 per month. These are MINIMUM expectations to KEEP their job
  + Have expectations set up and accountability that after the first 4 weeks if minimum expectations are not met position will be reviewed and put on notice
  + Reliability and consistency is a must – We will allow for excuses 1 or 2 times, but after it becomes a pattern we would address immediately and put on probation
  + In our experience, emergencies and natural disasters happen a lot
  + Acknowledge this up front – that continuous disruption of work will not be tolerated, and they are expected to have back up internet options and access to show up for work

**Compensation** – Sticking to the keep it simple method.

* You can easily pay your virtual employees as 1099 contractors through EasyPay or PayPal.
  + <https://www.onlinejobs.ph/easypay>
  + <https://www.paypal.com/>
* We suggest always paying after the work is done and either on a weekly basis or bi-weekly basis or with your current payroll timeline
* Many want easy ways to be able to track a timeclock, working hours, etc. There are virtual solutions, like Timeproof, that you can set up for your team
  + <https://www.onlinejobs.ph/timeproof>
* What about taxes? There are none. They are considered an overseas sub-contractor. You don’t 1099 them. You don’t report their wages. You don’t pay unemployment insurance. You don’t do any withholding. See your accountant.

**Duplication** – The beauty with this system is you are creating duplication! Once you get the first down, the second is easier, etc. And the great thing is by creating exact tasks and work processes, it’s easy to expand a department, replace or add another hire to no longer have lapses in your service or production with turnover. Virtual workers are incredible workers and create amazing additions to your team, your culture and your productivity! We are here to help set you and your team up for success.

**Culture** – What is the “13th month” in the Philippines?

* In the Philippines all employees get a bonus once a year of one month’s pay – “the 13th month”
* The bonus is paid in December
* Do you have to pay this? No
* Should you pay it? Yes absolutely! Your workers will expect it, need it and it is normal to them and their work experience and moral.