

# EBOOK: Evaluating a VA Company

## WHICH OPTION IS RIGHT FOR YOU?

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So, your company is growing and you've decided to explore hiring a virtual assistant. You've probably noticed that the choice of options is enormous. From dedicated to task-based, onshore to offshore, admin to marketing, entry-level to premium—the number of possible variations can be mind-boggling.

Fortunately, finding the right virtual assistant company doesn't have to be daunting. Read on to figure out what will work best for your unique requirements, and quickly cut through the crowd to find the perfect partnership to help move your business forward.

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## SOME QUESTIONS TO THINK ABOUT:

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### DO I NEED A DEDICATED OR A TASK-BASED VA? AND WHAT'S THE DIFFERENCE?

As the name implies, dedicated virtual assistant companies allow you to work with the same assistant consistently. If you plan to work with a VA for the long term, then a dedicated option might work best for you since it takes time to train someone in your processes and you will get more value from working with the same person over a long period of time.

With a task-based VA company, rather than having a single virtual assistant, you submit your tasks to a pool of assistants. This kind of arrangement tends to work better for basic-level admin tasks or one off tasks where there's no need for an assistant to learn about your business.



Be sure to ask VA agencies you are researching whether or not you will get to meet your assistant before any obligation to work together is required.





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### SHOULD I HIRE ONSHORE OR OFFSHORE?

If you are looking for a virtual assistant to carry out senior tasks on your behalf, be available to you during business hours, and handle tasks in sensitive or public-facing areas like social media, banking or scheduling meetings, than having an onshore virtual assistant who speaks your language and works in your country might work best.

If you are looking to delegate simple tasks that can be done at any time of the day and night behind the scenes and don't require access to personal accounts, than an offshore virtual assistant might work well for you.

Onshore, dedicated assistants usually come at a higher cost than offshore due to a higher level of service and experience, so if your focus is getting tasks done for the lowest cost, try exploring offshore options.



Be sure you ask whichever VA agency you choose where, exactly, your virtual assistant will be located. Some VA agencies might be based in the US, but use offshore assistants.



## SPECIFIC VA COMPANY POLICIES TO CONSIDER:

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### SHOULD UNUSED HOURS ROLL OVER TO THE FOLLOWING MONTH?

If you are using a task-based service that hands out your jobs to different virtual assistants each time, rollover hours can be a great perk. However, if you are working with a dedicated virtual assistant, rollover hours can actually be quite a negative. Check out our short narrative that explains why:



**This anecdote outlines the unseen issues with rollover hours:** Imagine that Ellen, your assistant, has 10 years of corporate marketing experience. You guys really hit it off and in the 4 months you've been working together she's made a huge difference for your business. She's writing content for you, managing your social media and other key responsibilities. She's available part-time, and working with you and three other clients.

In the scenario where you and her other clients can roll over their hours, Ellen is struggling to plan her time. She knows you are on a 20 hour plan, so she's reserved 20 hours for you, but in March you only used 13 hours. In April, you decided to make up the rolled-over hours and she suddenly needs to reserve 27 hours for you.

The thing is—the same thing happened with two of her other clients that same month—meaning that while Ellen's clients didn't use her services much in March, now with 3 of her clients rolling over hours she doesn't have enough available time to support you, and everyone's work begins to suffer. Ellen, who cares deeply about doing a good job for each of you, is devastated.

Finally after a few months of a scheduling nightmares and inconsistent income, Ellen realizes that the situation isn't sustainable, and she makes the difficult decision to find a more stable position elsewhere. The investment you made bringing Ellen onboard is lost and you have to start again with a new assistant. You can't find someone of Ellen's calibre that is willing to accept the lack of consistency, and in turn, your business suffers.

Contrast this with the scenario of an agency that does not to allow for rollover hours - this company will be able to work with you during the signup process to accurately estimate the number of hours you need and to set you up on the right sized plan. Ellen, your assistant, knows that if she sets aside those hours for you, that's what she'll be working. She's available when you need her and she's able to give her absolute best to you. You have consistency, she has consistency, and she throws herself into helping you develop your business.

As is typical with our team, two years later you're still working together and you've seen significant growth.





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## SHOULD I LOOK FOR FREE TRIALS?

Free trials follow the same rules as rollover hours - they are a great feature for services offering one-and-done or task-based VA's. But again, for dedicated solutions, they don't quite work.

For solutions offering dedicated virtual assistants, the service should take the time to perfectly match you to a VA that fits your needs, let you meet your VA before signing up, and figure out a game plan for working together before you are charged a dime. That way, you can get started on your chosen plan with the complete confidence of knowing the partnership will work out, rather than spending your time on a free trial that may or may not work out.

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## SHOULD I WORK WITH A COMPANY THAT OFFERS MONEY BACK GUARANTEE?

One of the great benefits of working with a VA company versus a freelancer is that they usually offer a money back guarantee. Look for a company that is confident enough in their team to offer a guarantee should you not be satisfied with the service.

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## SHOULD I PAY HOURLY OR ON A MONTHLY RETAINER?

Most offshore or task-based VA companies charge hourly or per-task. If you are looking to work with a VA for the very short term, then paying hourly might work well.



However, if you are looking for a dedicated and long term solution, paying a monthly retainer for your virtual assistant's time makes sense. It assures that your VA has visibility into their time requirement for you monthly, so they can plan and distribute their time accordingly, and you can rest assured that her your monthly retainer guarantees her time for your work.



Be sure to look for a plan that can be changed month to month, as it will give you flexibility as your business ebbs and flows.



It's also important to note that some VA agencies charge a signup or startup fee when beginning with their services. Be sure to ask in initial meetings if there is a charge for getting started.

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## SHOULD A VA COMPANY PROVIDE BACK UP?

We highly recommend working with a VA company that provides a backup should your primary VA be on vacation or unwell.

This is especially important if your work is ongoing and if you depend on your virtual assistant to maintain customer relations or carry out daily projects. Premium VA companies will often train a backup to ensure that you never go without help.

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## WHAT IS THE USE OF AN EXTENDED TEAM?

If your business is growing, you might find that from time to time you need support in many areas and not just in ways that your primary virtual assistant can help.

In such cases, it's really helpful to know that the virtual assistant company you are working with has an extended team with various skillsets to compliment those of your dedicated VA.



For example, if you have a VA to assist with marketing tasks, having a virtual assistant company that also gives you access to designers can prove very useful for his/her projects. Or, if you have a VA that helps you plan international travel, having a bilingual team behind her can make certain tasks much easier.

## **FINAL STEP: DECIDE WHICH OPTION IS RIGHT FOR YOU**

In closing, we hope this guide has been a helpful resource for you as you begin searching for your perfect virtual assistant, and shed some light on some of the things that differentiate certain VA companies. No matter which direction you decide to go, we believe making the decision to hire a VA is a great one, and wish you the best of luck!

