



How to Delegate to a VA (Virtual Assistant)

by **KATRINA SAWA**



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Hi there,

I'm so glad you're embracing the opportunity to start delegating in your business!

I've been delegating to assistants of many kind since 2003 and wouldn't be where I am today without my team; it's probably one of the most important things that helps to run my business and earn a multiple six figure income! (This is a pic from my team in 2011 or so.)



But it wasn't always as easy as it is now to find someone or know what to delegate to them or HOW to delegate and run a team!

I made a TON of MISTAKES!

Some of those mistakes were:

- Not asking for referrals
- Not checking references or past clients and work they've done
- Hiring them for what they "say" they can and will do
- Not having a clear checklist of what needs to get done
- Not having a clear plan on "how to interview or hire someone" (I had no clue, they don't teach you this stuff in business school, college or anywhere.)
- Not having good documentation to onboard them or let people go
- Not knowing all the legalities of hiring an independent contractor vs. an employee (I've done it both ways – with payroll too, what a pain!)

Don't do what I did and try to figure this all out on your own, trust me, it's painful and can be costly if you do the wrong things!

I like to walk my clients through how to hire, delegate, train and manage their team members, even if they just want to hire one assistant for a few hours a month, there is a lot to know, understand and implement to make it legal for both of you and an effective use of your resources.



In this short ebook, I'm sharing the basic stuff you need to know however if you want to get this implemented, I recommend at least having one phone call with me (or someone who's really knowledgeable) to make sure you're crossing your "t"s and dotting your "i"s. It will save you a lot of trouble in the backend.

We don't want you to hire the wrong person and waste time paying the wrong person. That's what I see happen most often. After that it's you hire them and then never delegate to them because you don't have a delegation list or plan and they aren't good at "helping you figure out what to delegate" or aren't good at "taking things off your plate".

So... let's get started!

Where you want to start, is building a LIST of things you would like to delegate now. Add in the things you KNOW YOU SHOULD be delegating also as well as the things that may not be getting done now, that you know you should be doing such as additional marketing, lead generation and sales type tasks – these are critical!

Here's the list I started developing and most of these I actually delegate now (or have systematized in some way online or using a specific technology).

STEP ONE: Put together ONE HUGE LIST. Start with this and add/delete.

Tasks to possibly delegate to a Virtual Assistant or some other contractor:

- Responding to customer e-mails and phone calls as needed
- Scheduling business and personal interviews or appointments
- Finding places to get publicity in person or online or watch HARO for opportunities
- Bookkeeping: tracking expenses and tax records, working with accountant
- Internet research
- Planning travel for seminars, workshops, personal
- Booking speaking gigs or reaching out for speaking opportunities
- Article Marketing, refreshing, seeking out places to post them or people to run them

- Maintaining customer mailing lists on easy to use database
- Managing the development of and distribution of your ezine



- Managing or communicating with your affiliates and updating affiliate program
 - Handling registrations for teleclasses/workshops and any facilitating of them or setting up the technology of them, opt in pages, follow up emails or reminder emails, etc.
 - Managing shopping cart and merchant account as needed and creating sales reports
 - Creating extra pages on website or more products and autoresponders in cart
 - Handling recordings of Teleclasses, edits, etc. and making them into CD's, e-books, transcripts, etc.
 - Handling bounced emails - fix them, resend stuff, etc.
 - Troubleshooting computer issues, problems, helping organize email inbox or folders
 - Arranging for shipping of customer orders and products
 - Placing ads in publications and on Web sites
 - Formatting e-books and sending out for printing
 - Getting new cover designs done up for each new product or new headers or online images designed as needed
 - Designing PowerPoint presentations
 - Sending out e-birthday greetings or actual cards to your list monthly
 - Purchasing gifts and sending occasionally to clients, thank you, welcome gift, etc.
 - Writing and mailing thank you notes often after I attend networking functions
 - Data entry of all new contacts
 - Coordinating direct mail campaigns and mailings, facilitating thru mail house, etc.
 - Transcribing Teleclasses or other audio or getting them transcribed - outsourcing
 - Creating Google Alerts for specific keywords and keyword phrases, and then flagging you to the high-page-rank blogs that are writing about your topic, so you can post comments.
 - Proofreading articles, press releases and website copy
 - Posting blog posts on your blog either with your content or repurposing, guest content or they will write
 - Researching media outlets that want your story ideas
 - Regularly reading the blogs of journalists who you want to get in front of
 - Submitting your press releases to press release distribution services
 - Updating your media contact lists to stay up to date
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- Uploading videos to sites like YouTube and then distributing them to social media, your blog, ezine, etc.



- Researching podcasts, Blog Talk radio, webinars and online shows that might welcome you as a guest
- Looking for book reviewers
- Finding content for your ezine and blog and posting accordingly as well as repurposing all your content in many places with repeat mentions, etc.
- Setting up social networking profiles, pages, connections
- Weekly updating and corresponding on social networking sites (social media messaging)
- Call people back or calling through database with a script with call to action for something – come to event, teleclass, follow up, sales, free call
- Design images with quotes or wording to use for social media marketing

STEP TWO: Sort that list into categories such as:

Technology

Admin

Financial

Customer Service

This will allow you to HIRE THE RIGHT PERSON FOR THE RIGHT TASKS.

Not all assistants or contractors are created equal nor do all of them really know what they are doing. And some of them are so desperate for more hours that they will say they know how to do something when they don't or really aren't proficient in that thing (and you don't want to hire them for that).

Only hire someone for a task or tasks that they LOVE to do for clients, nothing else.

It's better to hire multiple people for multiple jobs and just pay them for the time they spend then to be stubborn and hire ONE person to attempt to do it all. TRUST ME!



STEP THREE: You can do a combination of the following to find people:

Ask people for referrals who are delegating now

Run ads for people on sites like Craigslist or Upwork

Look at Virtual Assistant or related groups on Facebook and ask or post what you need in there.

Ask ME! I know a lot of people, send me an email with your LIST to katrina@katrinasawa.com

Then of course comes interviewing, hiring and training...that's where I may come in to help you further, if not before in the selection process as that's where a lot of entrepreneurs end up choosing the WRONG PERSON for the job because you don't ask the right questions!

I'd love to share a few more things with you if you're interested.... now that you have a list (at least that you can start with) on WHAT to delegate....

Most people also want to know:

- Where to find team members
- How to figure out which types of team members you need (i.e.; Web designer, Virtual Assistant, Personal Assistant, Errand Service, etc.)
- How to hire possible candidates effectively
- How to train your team members
- How to manage your team for long term success and productivity
- How to fire a team member that isn't working out (this isn't easy)
- What types of documents / agreements / contracts you want to have in place to set expectations, boundaries, fees, disciplinarian needs and things needed to protect your business, copyright and more.





I'm working on developing some more resources for all of these too but in the meantime, I can manage to answer any or all of this on a one-time coaching call with me if you want to dive into this now, work out a plan for YOU to know EXACTLY what to do!

Here is most of my team today... plus a few others who I bring in on select projects!



SIGN UP FOR A CALL WITH ME TODAY!

Sometimes I offer calls with me one time to try me out for as little as \$250 (reg \$750-1000/hour) and I'd like to do that for you today if you're ready to pull the trigger on building your team, even if it's just one person.



→ BONUS #1: when you come to a paid consult with me, if you need sample agreements, contracts, disclosures, Ads to find an assistant, etc. I will have them and email them to you on the spot for FREE!

→ BONUS #2: when you come to a paid consult with me, if you need referrals to Virtual Assistants, website designers, social media marketing people, SEO people or any other type of contractor, I can usually make a recommendation on the spot too or I can put a request to friends on my social circles and get you help before the end of the day.

Sign up here now for a PAID CONSULT and let's get you on the road to more FREEDOM in your life and business!

www.TinyURL.com/katcall250

OR... Would you rather come to a Free Jumpstart Session first and we'll see if this is a good thing for me to help you with? Or we may need to discuss a few things in your business to help you more productive, efficient and profitable before we talk about delegating; there's an "order of importance" in what you need to do in your business to reach your goals and I can help you identify that in a Jumpstart Your Business Strategy Session – it's free, sign up with this link:

→ www.AskKat.biz

Here's to creating and enjoying your happiest life ever!



Katrina Sawa

The Jumpstart Your Biz Coach

Speaker & Author of the book, Love Yourself Successful plus 13 other books to help you jumpstart many areas of your life and business!

916-872-4000

katrina@jumpstartyourbiznow.com

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3. Or just stick around and watch the video tips on my emails that you get now just for signing up for this checklist!

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