



# Be Virtual Assistant Wise

*Knowledge + Partnership = Success*

## “5WHOW” WORKSHEET

*John O'Connor Example*

Who wants the service	Who am I
John O'Connor	Administrative VA with experience in
Financial Planner / Sales Director	Insurance and Banking Industry (10 years )
XYZ Financial Services	Virtual Administrative Assistant (> 3 years)
Do some research on the company	Real Estate Industry (>5 years)
What do they expect me to do	What can I do
Managing Calendar and appointments	Yip
Ensure Sales Director has required documents and case follow-up files for updates & progress from last meetings	Yip
Identifies and delivers client forms according to Client Cycle Timeline	Yip
Manage and prioritise incoming e-mail	Yip
Integrate e-mails onto calendar if necessary	Yip
Sync current database between outlook and iPhone	Yip investigate MobilMe
Contact examiners to order medical exams for clients - for insurance	Yip
Organizes & coordinates completion of insurance applications & documents	Yip
Manage ongoing personal client contact	Yip
Online and e-mail marketing	Yip excellent experience
Response follow ups with clients	Yip
Managing PodCast production schedule	Limited experience - but have already investigated

<b>Why do they NEED these services</b>	<b>Why am I the best Candidate</b>
<i>They need Part Time Executive Support because:</i>	Have experience in all the services requested (10 years financial experience)
They need to expand their client base	Worked as a PA for a Insurance Broker before going into Virtual Assistance
They need time on hands to focus on client conversion	Financial Background - 4 Major Banks (understand industry)
They need to portray a friendly, professional client orientated image	I like to help people (giver) and enjoys people interactions
They needs to maintain an organised system	I'm organised, friendly and professional
Need a cost effective solution	
Be updated on schedule /appointments	I'm action orientated but keeps it balanced
<b>What special skills do they want</b>	<b>What special skills do I have</b>
Google Docs, Word, Outlook, MobilMe (iphone)	Google Docs, Word, Excell, Power Point
PodCast Production Schedule	Outlook and Outlook Express
Coordination Skills	Firefox
Online and e-mail marketing	Yip
Friendly and customer orientated	Yip
Desire for mutual beneficial results	Yip
Accountability and Integrity	Yip
Responsibility	Yip
Put in the extra mile if necessary	Yip
Be a "giver"	Yip
<b>What equipment do I need</b>	<b>What Equipment do I have</b>
None extra specified	Normal Office Equipment
	Everything to perform the requested duties

When do they expect me to do it	When can I start
No specific date mentioned	Taking my current work load into consideration
	within 14 days
Where is the client situated	Where am I situated
South Africa	South Africa - no time difference
	no special communication methods needed
How much am I going to charge / How will I charge	How much time and effort is involved
Cannot charge other than per hour seeing that	Seems to be an ongoing involvement
there are various tasks involved	Daily involvement of at least 2-3 hours
	5 days / week
	20 Working Days
Taking everything into consideration I cannot do	Various tasks, some really simple others more
this for less than R250-00 per hour or min R215-00 per hour with a retainer contract	complicated
	US comparison \$30 - \$35 an hour
	South African comparison R90 - R400 per hour
Cost per week: 2.5h x 5days= 12.5 hour/week	
12.5 h x R250 = R3125	
<b>Retainer cost savings:</b>	
normal costs: 10h x R250 = R2500	
Retainer rate: 10h x R230 = 3200	
Save R300/week or R1200 per month	
normal costs: 15h x R250 = R3750	
Retainer rate: 10h x R2150 = 3225	
Save R525/week or R2100 per month	