

Do I Need A Virtual Assistant? Checklist



A template to help you decide whether it's worth your while to outsource some of your administration to a Virtual Assistant.

INSTRUCTIONS

Read through this checklist and type a character in the **Problem** column for everything that is a problem for your

Step 1. business. (Regardless of whether it's because you dislike it, you don't have the time, equipment or knowledge to do it. Or even just because it always seems to be a problem for you.)

Step 2. Note down approximately how much time you'd spend working on the task (or procrastinating about the task) each month. (A guesstimate is OK)

Step 3. At the end of each section you will see a total number of ticks and the total amount of time you estimate each task would take. A Grand Total is at the bottom of the table.

Step 4. If you have 4 ticks in any section, then you should definitely consider outsourcing.

Step 5. If you have a total of 15 ticks altogether, you should definitely consider outsourcing.

If you're still unsure of the value of outsourcing, multiply the total time spent on the activities by your hourly value and

Step 6. see how much you could save by passing those tasks off to someone (who will probably be quicker than you at many of them)

You can either fill out the checklist online, in which case it will calculate as you go, or print it out and complete it manually.



Task	Problem	Time (mins)
Cashflow		
Data entry of receipts and invoices		
Produce and send invoices in a timely manner		
Perform regular (daily or weekly) account reconciliations		
Chase outstanding debtors for payment on a regular basis		
Ensure your accounts are always up-to-date for your accountant and/or bookkeeper/BAS agent		
SUBTOTAL		
Customer Service		
Monitor email accounts and data entry orders, organise appointments, respond to generic questions		
Answering the phone		
Monitor social media for mentions by customers or prospective customers		
Organise mailouts to customers for specials as well as "special occasion" emails such as a happy birthday wish, or		
Day to day administration tasks that prevent you from spending time with customers		
SUBTOTAL		
Marketing		
Maintaining & monitoring social media accounts and sharing social content		
Finding appropriate images and posting content that looks professional		
Working with designers and printers to produce marketing collateral (leaflets, business cards etc)		
Monitoring new business opportunity leads (AusTender, Tenders.Net and other sources of new business)		
Liaising with producers of other advertisements (Newspapers, Radio etc)		
SUBTOTAL		



Paperwork & Compliance		
Developing a process & procedures manual so you have consistent standards and processes / Problems caused by lack		
Developing filing systems so that information can be found when needed / Problems caused by lack of		
Scanning or storage of receipts and documents to make retrieval easier		
Creating templates for documents that are frequently used / delays or problems caused by lack of		
Keeping track of due dates for compliance information (i.e. when your BAS is due) & collate required information /		
SUBTOTAL		
Suppliers		
Placing orders with suppliers		
Chasing up missing stock from orders		
Monitoring inventory to see which stock performs well, and which doesn't		
Sourcing competitive pricing from suppliers		
Checking incoming invoices and resolving issues		
SUBTOTAL		

TOTAL

Tasks	Minutes
	Hours