



## The Virtual Nation

A community of learning.  
A nation of culture.  
A virtual village.

# How Can Virtual Professionals (VPs) Virtually Assist You?

## It's as easy as 1-2-3!

This document is to assist you in delegating the various day-to-day tasks you would rather not handle. Besides, Virtual Professionals can help you spend less time on 'adminis-trivia,' more time generating new clients and business income for yourself.

## Contact Management

VPs offer contact management services from database creation, maintenance to lead generation, and more.

- ❖ **Start a contact database.** Clients collect business cards all the time. They also collect scraps of paper, sticky notes, and old typed address books. VPs can take the business cards, scraps of paper, etc., and create a contact database using Excel, Outlook, ACT!, or any other contact management program. VPs use a business card scanner for those piles of cards, so don't be shy about handing over your shoebox!
- ❖ **Clean up current database.** Some of clients have already started a contact database; however, it is not useable for various reasons (i.e. old contacts, program too complicated, client has several files in various stages, etc.). VPs take your existing files and create one clean copy. Some clients want to be involved in the purging process, but sometimes, VPs can start by calling all the contacts on the list to obtain a clean copy. Some contacts wish to be removed from the list. VPs will compile all the removals into a separate report for the client.
- ❖ **Update a contact database.** Once the clean contact database is set up, clients periodically mail the business cards (or other forms of misc. papers), and then VPs scan the business cards or manually enter the data into the contact database. VPs can burn a CD with the database on it, and then mail it to back to you, but emailing as an attachment, or synchronize with the client's database via email or internet, depending upon where the program resides, is the quickest way to return the updated records.
- ❖ **Following up with prospects.** Clients attend or put on presentations, seminars and tradeshow where they collect a large number of business cards. VPs can enter the contact information, and then mail merge a follow-up email or typed letter. VPs can sign as the client's assistant, use a signature stamp, or font.
- ❖ **Track prospecting efforts.** Clients want to be sure they have connected with each of their contacts. VPs can help the client come up with a multi-touch plan with specific items (i.e. emails, letters, newsletters or ezines, postcards, greeting cards, etc.) on a regular basis (i.e. weekly, bi-weekly, monthly, annually, etc.). VPs help the client choose the marketing pieces, create customized designs for the client, and include a tracking number on each piece. When prospects call in response to the various pieces, VPs will keep track of each call (hot prospect, warm prospect, cold prospect, remove from database, etc.)
- ❖ **Creating systems.** Clients want the VP to send his/her prospects a standard welcome packet, or for new clients, a 'New Client' packet. VPs can use printed materials or electronic materials, both of which can be ready to send at a moment's notice. Clients email the VP the new or specific information or special requests for the mailings. VPs prepare and mail the standardized packets to the new prospect/client. VPs can track the packets, contract, expiration date and any other pertinent information. They can also send any reminders to any/all parties necessary.
- ❖ **Database conversion.** The client wants to change database software and needs to convert his/her previous version over to the new one. VPs are able to handle these types of conversions for most software.
- ❖ **Mine for leads.** There are various ways to obtain legitimate lists. Companies in the people business have public records available for lease, rent, or sale. VPs sit down with clients to define a specific target market for their products and services. This brings in quality leads that are already filtered out from 'everyone' in the whole wide world. It would be VERY expensive to market to the entire population on this planet, so filtering out the non-interested parties, will be more inclined to purchase from clients.



# The Virtual Nation

A community of learning.  
A nation of culture.  
A virtual village.

## Graphic Design Services

Graphic design services make up a large percentage of client work. From creating advertisement pieces to ezines and presentation materials, most VPs are able to create almost anything you can imagine.

These are possible graphic design projects you may be considering. This is an abbreviated list, so be sure to ask your VP about your ideas.

- Advertisements
- Announcements
- Awards & Certificates
- Brochures & Flyers
- Business cards
- Business forms
- Business stationery
- Calendars
- Catalogs
- Direct mail
- Ezines & Newsletters
- Fax Cover sheets
- Labels
- Letterhead/Envelopes
- Logos
- Personalized cards
- Postcards
- Press releases
- Price lists Product lists
- Presentation materials
- Schedules

- ❖ **Company stationery.** New start-up client needs all of their company stationery designed for their new business. VPs design each piece (i.e. business card, letterhead, envelopes, fax cover sheet, etc.) and anything else the client wants. Upon completion, VPs can work with a professional printer or possibly print short runs on their color laser printer.
- ❖ **Brochures, flyers, newsletters and more...** Clients need brochures, flyers, newsletters, and other company collateral. VPs can create these pieces from beginning to completion. Use a VPs talent to design, write copy, and finally coordinate the job with a professional printer or possibly print short runs on their color laser printer.
- ❖ **Ezines and newsletters.** Clients want to publish an ezine (online) or a newsletter (printed). Most of clients write their own content, but some request their copywriting services. For ezines, VPs use a several point checklist for both text and HTML-based pieces to be sure each important step is covered, and especially the CAN-SPAM laws. When preparing a printed version, it's important to also use a checklist. Clients use their own mailing list, but they may also request researching a specific demographic if they do not have their own to start. VPs can obtain lists as specific as women business owners living in Palm Springs who play tennis wearing the latest tennis apparel. These lists can target your market without a lot of cost. In addition, they can design, type or write the copy, and fully prepare the ezine or newsletter for distribution. Ezines use a program online to disseminate the piece while Newsletters will cost more since paper, ink, postage, and labor are involved. Costs for monthly ezine distribution subscriptions are very affordable.
- ❖ **Awards and certificates.** Awards and certificates can be created for any occasion, such as clients, employee recognition, membership certificates, participants completing a seminar etc. VPs can design each piece, write the copy, and send the job to a professional printer or possibly print short runs on their color laser printer. If the client wished to add special touches (i.e. ribbons, seals, etc.), VPs can order these items from a local office supply or online. The completed items can be delivered directly to the client or the recipient.
- ❖ **Engraved awards.** When clients want to present someone with a special award, engraving adds a nice touch. VPs work with local and online companies specializing in engraved awards. The exact wording is emailed to the VP for placement on the award and then, they'll take it from there. VPs handle all the details, including having the award delivered directly to the client or the recipient.
- ❖ **CD/DVD duplication and distribution.** CD/DVD duplication and distribution is becoming easier to do everyday. VPs can research a professional company to handle the entire process with the exception of individual mailings, or design and print labels using the client's branding on the CD, cover insert, and the packaging. VPs can coordinate the shipping to go directly to the client or the recipient.
- ❖ **PowerPoint.** Producing PowerPoint slide shows for enhanced presentations and/or seminars is another services VPs can help clients with. After the client provides the rough pencil sketches, including diagrams and charts, VPs are able to put together various options for clients to choose from. Once the client approves the drafts, the VP can complete the design and possibly write the copy. VPs will email, upload to a secure share folder, or mail the presentation to the client.



# The Virtual Nation

A community of learning.  
A nation of culture.  
A virtual village.

## Marketing Support

- ❖ **Target markets.** There are various ways to obtain demographics for the client's target market. Companies lease, rent, or sell lists online based on the selected criteria. As previously mentioned, VPs sit down with clients to define a specific target market for their products and services. This brings in quality leads that are already filtered out from 'everyone' in the whole wide world. It would be VERY expensive to market to the entire population on this planet, so filtering out the non-interested parties, will be more inclined to purchase from clients. Defining the target market makes a huge difference in the budget for marketing dollars. VPs can help maximize every dollar for clients.
- ❖ **Media exposure.** The client would like to get more media exposure for his/her business. VPs can create a series of news releases about the company, a press kit, and possibly articles to submit to various media outlets. VPs work with their client to brainstorm unique ideas and come up with a specific media campaign over a set period of time (i.e. weeks, months, etc.). The VP writes the copy and then provides each piece to the client for final approval. Upon approval; VPs submit the press releases to various local, regional and/or online media outlets generating consistent exposure (i.e. articles, speaking engagements, etc.). VPs track the online exposure using Google Alerts or online clipping services. The collected data is formatted into a report for the client, which is forwarded to the client.
- ❖ **Marketing plan or strategy.** A client would like to set up a marketing plan and/or strategy with a budget. Together with the client, VPs examine the client's previous marketing--the successes and failures. VPs determine possible causes for success or failure. VPs work with the client to reveal competitor's marketing practices, new and innovative marketing techniques and the client's personal preferences for future marketing. All ideas are based upon the client's budget.
- ❖ **Advertising plan I.** The client wants to start an advertising plan. VPs sit down with the client, figure out what mediums to use, what types of advertising (print vs. online, magazine vs. television, etc.), and work up a plan from there. Once the plan is in place, VPs monitor the plan from inception to fruition. VPs submit ads by deadlines, track expirations dates, coordinate payments, handle correspondence with advertising vendors, and continually update the advertising report and/or advertising budget report for the client's review.
- ❖ **Advertising plan II.** VPs have advertising resources on the Internet, magazines, periodicals, newspapers, etc., as well as pricing information, publishing dates, publishing deadlines, payment policies, etc. All information is compiled into a report for the client to review prior to making decisions on an annual advertising budget, campaigns, or other major advertising decisions.
- ❖ **Mailings.** Books, marketing materials, welcome packets, media kits, etc. are projects clients often give up. They either do not have the time, or would rather spend their time generating more leads. The materials are mailed to the VP for on-demand distribution. VPs set up a generic email with the client's domain name where requests are sent directly to the VP. The VPs fax number and/or a generic email are advertised, as well as their return address. This keeps all the tracking and reporting in the VPs office. All mailings are tracked using a simple form, which is emailed to the client.
- ❖ **Direct mail.** What is the least expensive advertising/marketing effort available as a one-to-one contact? Direct marketing! VPs can help clients get set up with a direct mail house for larger needs, but smaller mailings can be completed using one of their preferred providers, or in-house services. From the first idea to the design, and out to the post office, VPs are able to fulfill clients direct mail needs.
- ❖ **Tracking marketing pieces.** The client wants to track his/her marketing. VPs create a simple form for the client to use when prospects and/or sales requests come in to the client's office. VPs put together a binder with the tracking forms so the client can easily access the tracking system, and logs the data in. Once per week, per month, or so, the client sends the sheets. VPs log them into the computer and evaluate the collected data. This allows the VP to monitor the effectiveness of each piece of marketing the client is using. VPs can shift to other more effective areas, streamline current successful campaigns, or create new ideas altogether.
- ❖ **Survey says,...** Surveys can be a great way to also be sure customers are satisfied with the client's products and/or services. Feedback is also one way to be sure your company message is in line with what your client's perceive it to be. VPs help clients create surveys through online programs sent via email or on their letterhead to be printed and mailed. Once the surveys have been completed by the client's, VPs compile the results and report the findings to the client.



# The Virtual Nation

A community of learning.  
A nation of culture.  
A virtual village.

- ❖ **Teleclasses.** Teleclasses considerably reduce event budgets. Not only that, but repackaging online seminars (teleclasses) for resale as a downloadable piece on your website can bring in passive income. Selling traditional seminar seats can cost thousands of dollars. With the advent of teleclasses, spending less than \$50.00 to host your own teleclasses is fairly standard. This fee can also be reduced or eliminated by using subscription programs. The downside is that the client would be responsible for marketing his/her own classes/workshops. The VP can set up the teleclasses, direct a marketing campaign to advertise the class, as well as set up a fully automated shopping cart for attendees to pay for their seats in advance. Directed marketing for teleclasses can be as simple as posting calendar notices in various online and local media outlets, affiliates, message boards, and distribution centers in print and online.

## Web Maintenance & More

- ❖ **Website Maintenance.** Changes made to the client's website can be done providing the VPs software is compatible. VPs primarily use Dreamweaver; however, they can also assist clients with FrontPage sites. Template sites are relatively simple to use and can be edited without a great learning curve. Clients email the changes they would like made, VPs take care of the rest. Upon uploading, the client reviews and approves of the changes.
- ❖ **Ezine list corrections.** Ezine distribution software is automated, but on occasion, bounced messages are delivered to the client's inbox. These can be forwarded to the VPs office where he/she can edit the contact list. To relieve the client of this task, the VP can set up the software with a generic email address, which the VPs office monitors. Then, the VP would take care of any changes as they happen without getting the client involved. Weekly and/or monthly reports may be sent to the client.
- ❖ **Article and ezine submissions.** Growing article or ezine contact lists may seem difficult if efforts are not directed to a larger audience, such as the internet. VPs can submit client articles or ezines to various online submission companies where others can view the piece and possibly subscribe, thus increasing the chances for growing a broader audience.
- ❖ **Audio notes.** There are simple tools to create audio via your telephone for placement on your website or sent as audio email notes. VPs can subscribe clients to this type of service, provide clear instructions, and take care of the distribution. This technology is being used on a limited basis, but may gain popularity if more people find out how easy it is to implement.

## Internet Research

- ❖ **Internet research.** VPs can 'Google' just about anything clients desire, as long as it is not illegal or goes against the VPs own values. VPs have performed research on thousands of products, services, and topics, ranging from books, computers, genealogy, telephones, DSL, furniture, software, affiliate programs, business networking organizations, summer camps for kids, and much, much more. The internet is constantly growing, so there is no real 'end' in sight.

## Word Processing

- ❖ **Typing.** The client hand writes notes, takes minutes, writes a letter, etc. The client can fax, scan and email, or mail the notes to the VA. The VA formats the materials, prints on the client's stationery, and mails to the recipient, to the client, or e-mails the notes to the client.
- ❖ **Manual.** An employee manual, business policies and procedural manual, workbook, or any other kind of manual can be designed, typed and formatted for the client. The client can produce the rough copy by email, fax or mail. VPs can make changes, email as an attachment to the client, or burn a CD, which can be mailed to the client.
- ❖ **Copywriting.** For advertisements, marketing, manuals, workbooks, or other written materials, VPs can write the copy if his/her client would rather have the VP handle this. Many times, the VP provides the starting copy, then the client edits to better match his/her own voice or writing style.
- ❖ **Editing & Proofreading.** VPs can type; format, proofread, edit, spell check and grammar check all creative pieces and/or documents.
- ❖ **Virtual meetings.** VPs can attend virtual meetings; record and outsource for transcription (i.e., FreeConferenceCall.com or Voxwire).



# The Virtual Nation

A community of learning.  
A nation of culture.  
A virtual village.

## Administrative & Personal Assistance

- ❖ **Event planning and travel arrangements.** VPs can create, assemble, and send invitations, receive RSVP's, coordinate catering, DJ, rental equipment, etc., and put together a simple spreadsheet to keep the client on track, on time and on budget. When clients put on seminars outside of their own area, the VP can assist every step of the way. The VP can make all the travel arrangements, including hotel accommodations, remote event management, and more. Whether the client needs a conference room for a seminar, DSL or telephones, VPs can take care of it all. VPs can contact several hotels in the area to find availability of the date, size, and specifics of the seminar, as well as obtain written quotes from the hotels that can accommodate the request. Finally, VPs can review each quote for completeness and reports the findings to the client.
- ❖ **Mail processing.** Process mail, email, bills, etc. Clients can elect to have their mail forwarded to the VP's mail box where it is collected 4-5 times per week. VPs go through each piece and sort out the junk from the relevant. Clients can have the VP monitor their email in much the same way. This saves clients a lot of time, reduces busy work, and stress, while their focus is on their core business.
- ❖ **Online banking and credit card processing.** Online banking has made it very easy for me to help my clients streamline their bill paying process. VPs take all of their client's bills and enter them into the online banking system so they are ready for payment. Some clients still like the control of paying their own bills, while others would rather have the VP set up the online banking once and show them how to do it, then they are on their way. In addition, VPs can assist their client's business by process credit card transactions for their clients.
- ❖ **Online calendaring.** Set up automatic reminders in an online calendar. The client has a hard time remembering birthdays, anniversaries, etc. The VA can e-mail or telephone the client with these important dates. Greeting card services can be set up by the VA so all your cards are sent out on time along with a personal greeting. The client makes appointments and then forgets to keep them. The VA can keep a client's calendar and remind the client of those dentist/doctor appointments, classes to teach, and classes to take, or project deadlines.
- ❖ **800 #.** Set up an 800 number for more effective and far-reaching client prospecting
- ❖ **Tracking continuing education.** Find and track coaching classes for continuing education credits
- ❖ **Intranets.** Create, maintain and update files for intranets and online meeting rooms for team interaction
- ❖ **Personalized notes.** Handwritten, personalized greeting cards, letters, and notes
- ❖ **Gift purchasing.** The client needs to purchase gifts for his/her family or friends. The VA can purchase gifts online and have them sent to the client or have them sent directly to the recipient.