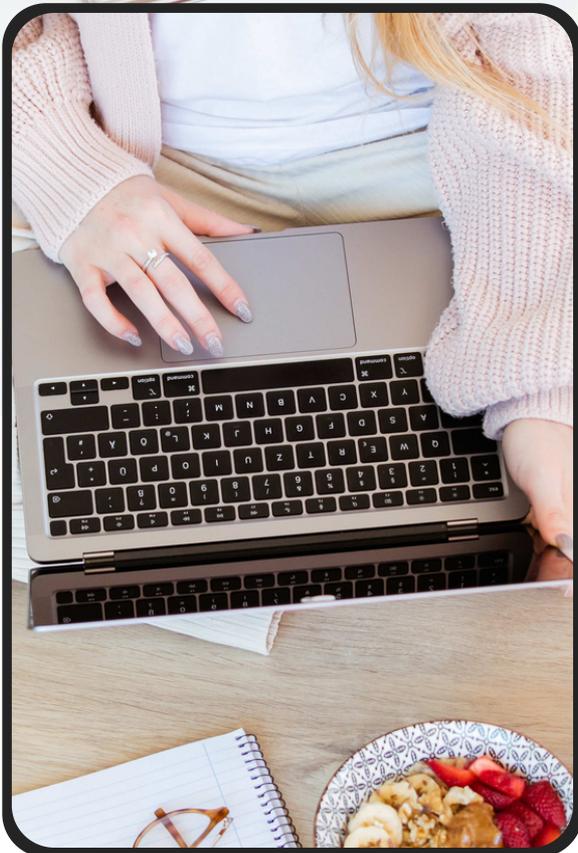




VIRTUAL ASSISTANT MANUAL



What you need to know when
hiring a virtual assistant

BY TAG TEAM



Services

- Administrative Services
- Marketing Services
- Prospecting Services
- Customer Service

ADMINISTRATIVE SERVICES

- Data Entry
- Email and Calendar Management
- TAG TEAM Process Management
- TAG TEAM Database Management

MARKETING SERVICES

- Social Media Management
- Email and Calendar Management
- Content Management
- Multimedia Design

PROSPECTING SERVICES

- Real Estate Outbound Calling
(with intake forms only)
- Script Library
- Client Relationship Management
- Lead Processing

CUSTOMER SERVICES

- Concierge Services
- Customer Support
- Technical Support



WHY CHOOSE TAG?

Reasons why our clients trust us with their virtual assistant needs.

1. TIME TRACKING PROTECTION

All of our employees are tracked through an active IP address. This allows us to track and source all work projects, and billed hours etc.

2. DEDICATED ACCOUNT MANAGER

We have three levels to our accountability chart to ensure service.

- Director of Marketing
- 2 Account Team Leaders
- Several VA's

3. TRAINED AND TECH CERTIFIED

All of our VAs are certified in HubSpot CRM/CMS and have a 4-year bachelor's degree in marketing, accounting, & Technology.

4. PART TIME / FULL TIME OPTION

PT = 25 Hours with bonus structure.

FT = 40 Hours with bonus structure.

Project-Based = starting from 20 Hours

5. BACKGROUND CHECK

All of our VAs go through a background check.

6. ACTIVITY MONITORING

All activity monitoring is virtual through our proprietary systems along with using Trello and Slack.

7. VA REPLACEMENT GUARANTEED

If your VA does not work out within the first week we will replace him/her for free.



Our Virtual Assistants are based in the Philippines.

The Philippines is the most popular and affordable location for outsourcing and hiring virtual assistants due to the lower cost of living, accent-neutral English, exposure to Western culture, and amazing work ethics of Filipinos.

Most Fortune 500 companies are outsourcing their call centers and customer support centers to the Philippines because of the beneficial business climate. They have to demonstrate the necessary system and workplace requirements and undergo rigorous training.

Our dedicated Account Managers also ensure the quality of work and accountability among our virtual assistants by strictly implementing activities such as Live Role Play Sessions with feedback & Live Coaching Sessions to identify weaknesses and improve them. As you can see, our virtual assistants go through rigorous hiring, vetting, and training process to ensure that you are getting the best virtual assistant on the market.

REAL ESTATE

Our virtual assistants can help you scale your real estate business by helping in lead generation, marketing campaigns, TAG TEAM Intake forms, listings, workflows, email marketing, and Social media.

MARKETING

Our team offers Social Media and Content management for businesses that need extra support. Our service covers all Social Media platforms, posting, and engagement.

IT/TECHNOLOGY

Whether you need a product tester, or a tech support person to answer calls, engage in ecommerce, fill out online orders or any type of processing, you should consider a virtual assistant.

PROPERTY MANAGEMENT

Partner with a virtual assistant so they can help you with collecting rent, dispatching workers and contractors, receiving service requests, and more.

ACCOUNTING

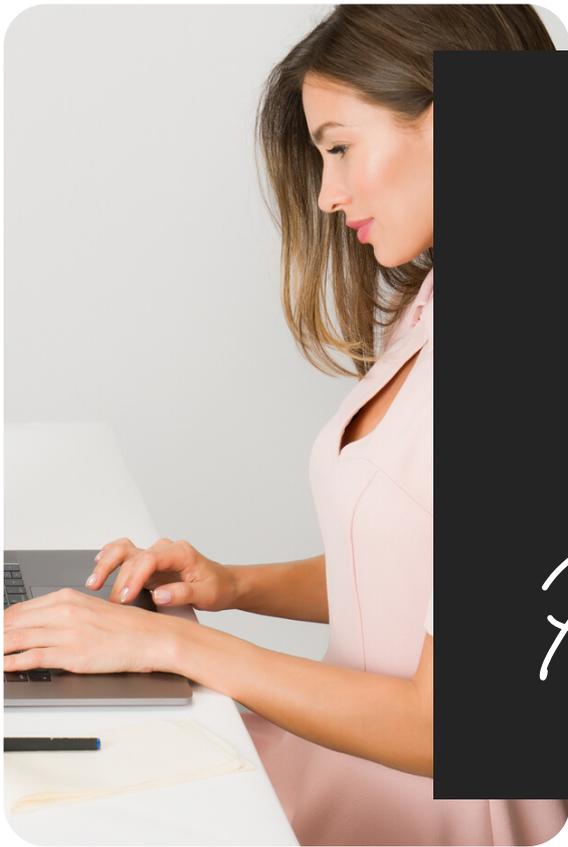
Your Virtual Assistant can manage QuickBooks, handle invoices, billing and basic bookkeeping.

LEGAL

Our virtual assistants can perform legal research and manage marketing and administrative work for your law office.

HUMAN RESOURCES

Our human resource virtual assistants can assist you in administrative work such as communicating with employees about benefits, performing payroll duties, and supporting recruitment and hiring operations.



Package

FULL-TIME 40 HOURS / WEEK

Full-Time virtual assistants work 40 hours/week on tasks such as Marketing, Prospecting, Administrative, Customer Service, and more.

This is our best valued package!

PART-TIME 20 HOURS / WEEK

Part-time virtual assistants work 20 hours/week on tasks such as Marketing, Prospecting, Administrative, Customer Service, and more.

PROJECT-BASED 20 HOURS / WEEK

Project-based virtual assistants can be hired to work for 20/40/60/80 hour time blocks for the short-term projects of our clients.

This capability provides a remote Virtual Assistant coverage of basic admin tasks. In essence similar to a personal assistant, this service lets you leverage an actual Virtual Assistant to address your daily routine and office minutiae associated with running your business.

ADMINISTRATIVE SERVICES

DATA ENTRY

Sort out, prepare, and compile your documents that is at par with your data management process and business needs

EMAIL AND CALENDAR MANAGEMENT

Manage your business calendar and coordinate any appointments to ensure that you are on track with your schedule.

TAG TEAM PROCESS MANAGEMENT

Systematically maintain all standardized operating procedures in handling contracts for your business.

TAG TEAM DATABASE MANAGEMENT

Manage interactions between current and potential leads based on the strategic, collaborative, and operational platforms of your business.

50 THINGS ADMINISTRATIVE VIRTUAL

ASSISTANTS CAN DO FOR YOU

1. Answering phone calls
2. Voicemail Checking
3. Filtering Emails / Managing Spam
4. Respond to emails
5. Setting up Autoresponders
6. Database Building / Updating Contacts or CRM
7. Calendar Management
8. File Management
9. Appointment Scheduling
10. Reminder Services
11. Data entry
12. Organizing to-do list and calendar
13. Plan and schedule appointments and events
14. Manage a contact list
15. Provide customer service as the first point of contact
16. Manage current and potential leads
17. Prepare customer spreadsheets and keep online records

50 THINGS ADMINISTRATIVE VIRTUAL

ASSISTANTS CAN DO FOR YOU

18. Perform market research
19. Create detailed reports using (Excel, Trello visual boards, or Google docs)
20. Creating / Managing Spreadsheets
21. Organize cloud storages PDF Conversion, Splitting, and Merging
22. Create presentations, as assigned
23. Onboarding Assistance - welcoming new employees and informing them about your company's processes, tools and software, communication guidelines, and more.
24. Type letters, documents, and notes
25. Forms Creation
26. Document Template Creation
27. Organizing technical support tickets
28. Participating in chat support
29. Preparing training manuals for new staff members
30. Composing documents from handwritten drafts, faxes, and dictations

50 THINGS ADMINISTRATIVE VIRTUAL

ASSISTANTS CAN DO FOR YOU

31. Create forms or surveys for customer feedback
32. Proofreading documents and other office materials
33. Bookkeeping - keeping digital records of your financial transactions, uploading receipts, and entering cash flow data for your accountants.
34. Payroll duties - calculating hours, adding expenses, updating salaries.
35. Invoice Creation - creating invoices on your preferred invoicing or payment platforms and sending invoices to customers.
36. Payment Tracking - using your payment tracking system to collect payments and keep accurate records of transactions
37. Scheduling Bill Payments - helping ensure that your company's bills are paid on time to avoid late payment fees and penalties.
38. Set-up Social Media Accounts (Facebook, Instagram, Twitter, LinkedIn, Youtube)

50 THINGS ADMINISTRATIVE VIRTUAL

ASSISTANTS CAN DO FOR YOU

39. Manage and update Social Media Accounts

41. Publish posts on your Blog

42. Filter and reply to comments on your blog

43. Posting and Scheduling

Facebook/Instagram/LinkedIn/Twitter Posts

44. Promoting Facebook Pages

45. Upload Videos on YouTube

46. Moderating YouTube Comments

47. Collating and Interpreting Facebook and Instagram Insights

48. Answer inquiries and Messages on All Channel & Profiles

49. Creating Email Newsletters

50. Creating Checklists Provide customer service as the first point of contact

WHAT RESPONSIBILITIES DOES A GENERAL VIRTUAL ASSISTANT HAVE?

As your business grows, so do the tasks and responsibilities you need to carry out; as a result, more clients to deal with, more transactions to complete, and more documentation to fulfill. At times, you might even be thinking, "I've got more business than I can handle". If that's the case, now would be a good time to focus on things that need work.



Our Marketing Virtual Assistants boast/possess essential digital and social media marketing skills to ensure your digital presence captivates existing and new audiences and reach more prospective clients. Marketing VAs maintain your social media platforms via marketing campaigns to attract new business. VAs also develop marketing content in text, image, audio, and video formats to deliver email marketing campaigns and blog content, multimedia content and its editing, graphic design, and much more. For all your marketing needs, our Marketing VAs got you covered!

MARKETING SERVICES

SOCIAL MEDIA MANAGEMENT

Achieve your marketing objectives based on campaigns that are most relevant to your business needs

EMAIL AND CALENDAR MANAGEMENT

Develop marketing strategies through email marketing to execute campaigns that are most suitable to your business..

SOCIAL CONTENT MANAGEMENT

Leverage your business through creative and captivating marketing content to attract potential leads and promote customer engagement.

MULTIMEDIA DESIGN

Creating content through text, images, sound, video, or a combination of the above.

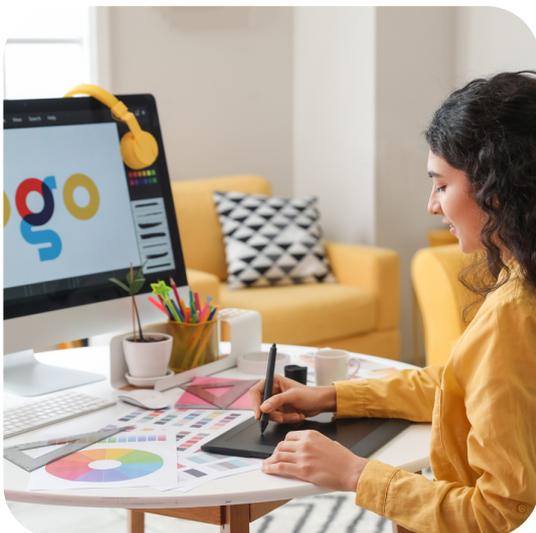
BOOST YOUR SOCIAL MEDIA WITH VIRTUAL

ASSISTANT CHECKLIST

Your VA will help you set up your webinar

- Create the link, set the date and time on the webinar platform
- Create the content (Webinar flyer, presentation, checklists)
- Write emails to existing and prospective clients, promote the session
- on your social media pages, or run paid advertising
- Test run your webinar
- Record webinar
- Create a Youtube thumbnail
- Upload it on youtube
- Share the webinar in a newsletter

*Let our VAs design
and do GRAPHICS
for your business?*



- Make a list of ideas Do basic keyword research
- Create an editorial calendar Write the post
- Set the graphics frequency
- Plan, design and develop signature graphics
- Develop graphical presentations
- Update your website with graphics and multimedia

PROSPECTING SERVICES

SCRIPT LIBRARY

Use of provided scripts and custom training optional

CLIENT RELATIONSHIP MANAGEMENT

Filter through your leads and provide you with an organized list of current statuses. (Top Producer, Commissions Inc, etc.)

LEAD PROCESSING

Have someone to do outbound calling for you to generate leads and increase your business pipeline.

Our most popular package is an excellent solution for growing your client base. Our clients choose to hire an Inside Sales Agent (ISA) to actively prospect for new business by executing outbound email and cold call campaigns, fielding the incoming web inquiries and phone calls to qualify the leads and organize them accordingly, lead follow-up and nurturing consistently performed to keep your brand atop your industry competition.



TOP 10 BEST PROSPECTING TOOLS

- | | | | |
|---|-----------------|----|------------------|
| 1 | Hubspot crm/cms | 6 | Capsule CRM |
| 2 | Pipedrive | 7 | Close CRM |
| 3 | Insightly | 8 | Redtail CRM |
| 4 | Salesforce CRM | 9 | Agile CRM |
| 5 | Zoho CRM | 10 | Vtiger Sales CRM |

CUSTOMER SERVICES

CONCIERGE SERVICES

Let our Virtual Assistants help you in making sure all your calls are attended to with our Concierge Services. They are ready to answer and take your phone calls to ensure that all your clients/customers are taken care of.

(Our intake forms work well with this)

CUSTOMER SUPPORT

Our Virtual Assistants can assist your customers with their inquiries and other business-related concerns. With our First Call Resolution mindset, our Virtual Assistants can definitely help your customers in managing their concerns.

TECHNICAL SUPPORT

Not in the Real Estate business? No worries! Our VAs are trained to handle other lines of businesses such as tech businesses.

Our highly trained team specializes in providing excellent customer service by providing information on products and resolve any existing customer issues through first call resolution.

TIPS ON WORKING TOGETHER

WITH YOUR VA

- Schedule daily check-ins.
- Use a communication tool such as Skype or Slack to conduct quick daily check-ins (ideally, at the beginning of their workday) with your Virtual Assistant.
- Require weekly reports

KEY ISSUES



What tasks or projects did they complete?



How much time did they spend on each task or project?



What are they still working on?



Did they run into any problems or challenges?



Do they have any feedback, questions, or ideas for you?

TOP ESSENTIAL TOOLS USED

BY OUR VIRTUAL ASSISTANTS



COMMUNICATION TOOLS

- Slack
- Zoom
- E-mail
- Ring Central
- Salesmessage



CRM

- HubSpot
- Follow-Up Boss
- Top Producers
- KV Core
- Chime



PROJECT MANAGEMENT TOOLS

- Trello
- Asana,
- Basecamp
- Miro



FILE SHARING & SECURITY

- Google drive
- Dropbox
- LastPass

HOW TO TRAIN ADMINISTRATIVE VA

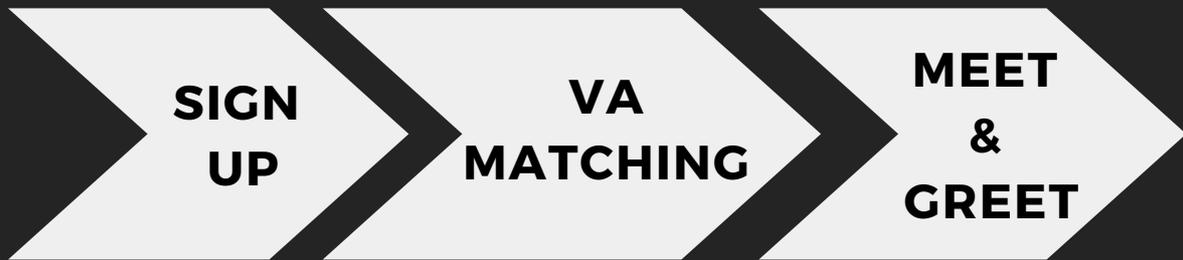
- If you are training them on the general aspects of the business, you might consider self-recording an audio or video for them to listen to. (Tag team monthly training sessions are part of our package)
- Create checklists with detailed daily tasks.
- Your VA should know how to use MLS, especially how to sort out, prepare, and compile your documents that are in part with your data management process and business needs.
- You will need to ask them to follow up on transaction documents updates.
- Your VA should know how to schedule appointments and events (VA can use google calendar, Calendly- schedule appointments, Trello - to create vision boards, keep track of meetings and tasks, and Zoom - to schedule online video conferences).
- It's very important to show your VA how to manage interactions between current clients and potential leads (VA can use CRM software, Google sheets, etc).
- When your virtual assistants come onboard, inform them about your security settings.

HOW TO TRAIN MARKETING VA



- Make a list of ideas and share them with your VA, also you can subscribe to very useful services like Canva, Adobe Illustrator, Photoshop, etc.
- If you don't have the ability to record things, you can still document each step in a Word document and take screenshots of the different steps.
- Create an editorial calendar, so you can monitor which task your VA is doing right now.
- First of all, you can create simple tutorials that walk them through each step.
- You and your VA will need to come up with signature graphics that he will use in the future.
- It is very important to ask your VA to send you Test email campaigns, before sending them out to clients.

THREE EASY WAYS TO GET YOU STARTED



1. Check our products and services. Let us know specific details of what you need for your business.
2. We'll find VAs with qualifications that match your requirements and send their DISC Profiles and Resumes for you to interview them.
3. Meet with your chosen Virtual Assistant and Team Manager assigned to work with you.



ARE YOU READY TO HIRE AND MEET YOUR NEW
VIRTUAL ASSISTANT WHO CAN HELP YOU AND YOUR BUSINESS?