

5 Simple Steps to Finding and Working with an Outstanding Virtual Assistant

Step 1: Acknowledge Your Overwhelm

I know it seems a little strange to start with yourself because I know you are just itching to get going with finding someone to help you out so that you can shift things off your plate and really start to work on the things you love to do and why would thinking about overwhelm help and surely they'll just be able to pick things up immediately because that's what VA's are really good at and it would be so good if ...

Hopefully that last paragraph got you feeling a little breathless as you read it. Maybe you got a little rising feeling of panic? A knot in your chest or your stomach?

That is what overwhelm is like - that feeling of things beginning to spin out of control. Of there being so much to do that you don't know where to start. Of helplessness.

And breathe! And maybe even move to another space as you continue to read this guide. Seriously - walk to another place - then sit down and start to read again. I need you to move away from that feeling of overwhelm so you can start to understand it a little better.

That's OK - I'll wait until you get back here again.

So, this is the feeling we find ourselves locked in to when we actually dare to look at what we need to do in our business. And I do mean dare, because most of the time we often will just push it all to one side and carry on as if nothing is wrong.

It's also the feeling that causes us to finally take action and reach out for help.

And yet what happens at that point is often the start of our problems with finding help that really works for us.

We are so overwhelmed that we grab the first offer of help that comes our way. And the sense of relief is immediate and huge. And we think to ourselves "at last - help is here and everything is taken care of."

But it's not.

Because that person you just hired to help you really has no idea of what specifically you need help with. And that is because you haven't thought too hard about what you

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need help with. And you certainly haven't articulated it to them in a way that will help them do the best job that they possibly could. You talked to them on the phone and they sound like they have all the right skills, so why wouldn't they be a perfect fit.

But - if you haven't got out of your own overwhelm yet, the your sense of overwhelm will transfer to your new VA and they will start to feel it to and possibly become as overwhelmed as you.

So what to do?

Well the quickest way I know to get out of overwhelm is to take a breath, change my location (now you know why I asked you to move somewhere else!) and then start to list all the things that are overwhelming me so that I can get some distance between me and all that stuff!

Which brings us to ...

YOUR ACTION STEPS:

- Go grab a pen and either a stack of 3x5 cards or some sticky-note pads.
- Maybe get yourself a glass of water or a cup of some beverage that you find soothing and calming.
- Then start to think about all the things you need help with, and as you think of them write each one down on the card or sticky-note.

There is only one guiding principal here and that is one thing per note. If you find yourself writing "and" or multiple sentences, put that next thing on another note.

The goal here is to get the things out of your head and onto paper so that these things are not overwhelming your brain any more!

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Step 2: Get Specific and Know What You Want

Already you are starting to feel better, right? It's as if the small step of writing something down takes the pressure off and you don't have to remember it any more. That's why most of us will always be happier when we start to write things down on some form of list.

So why didn't we just use a list here?

Well, mainly because the items on a list are hard to re-arrange and group together, and that is what we want to do now, is bring some order and coherency to the pile of stuff that we need help with!

So let's get straight to ...

YOUR ACTION STEPS:

- Take the pile of notes that you created in Step 1 and sort them into groups of activities/tasks that belong together, either because they are related to the same project or because they feel as though they should be done together.
- As you create the piles you might find some duplicate things or some extra things that you think of. So tear up those notes that you don't need and add in any extra ones that you do.
- Once you have all of the things you need help with grouped into mini-projects, I want you to select just one of those mini-projects as the first thing you would like help with. I know that all of those mini-projects will be screaming "Me! Me! Me!" at you. And that's OK. They'll all get their turn. We just want one that won't take too long to do (in your mind) and will have a measurable impact on your business.

The guiding principle for this step is that you don't have to know exactly how all these things need to get done, just that they are a key part of moving you forward in your business and you can't do them yourself.

This may be due to a lack of time or knowledge. It doesn't really matter the reason, what's important is that these mini-projects make sense to you. That way when you describe them to someone else, you'll be able to articulate what you want with relative ease and clarity.

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Step 3: Go Dating!

No I'm not literally asking you to start dating someone - but we are going to take this concept and apply it to finding someone to work with. You know - the idea of spending a little structured time with someone to see if you get on OK. To figure out if spending more time with them might be kinda fun for both of you.

This was a technique I learned from one of my mentors, Tina Forsyth. She is one of the leading edge thinkers in the world of leverage and hiring the right help for your business. One of the key elements she teaches all of the Online Business Managers (OBMs) who go through her certification training is to **date prospective clients**.

When we talk about “dating” in the context of looking to hire some help for your business the goal is to have someone complete a small project for you that allows you to see if your working styles are compatible, figure out if they get you and your biz and they can deliver the goods.

Our small project needs to meet a defined set of criteria:

- Can be completed within a short time frame (1-2 weeks)
- You can easily see and test the results of the project
- It gives you an opportunity to interact with the person who does the work for you

Some examples of good “dating” projects might be: setting up an autoresponder series for a new campaign; reviewing your web site and looking for areas where improvements can be made; getting a specific online profile updated.

You can see from these examples we are not looking for projects like creating and launching a new product or organizing/running a telesummit. Projects of this size and nature are not great for dating. It would be like asking your new date to help you cook Thanksgiving or Christmas dinner for your family. That's not a risk anyone should be taking - even if you were dating a cordon bleu chef! In fact especially if you had just started dating a cordon bleu chef :-)

So now we have an understanding of what we mean by going dating, you want to: make a final decision about the dating project you'll use; decide how you are going to

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evaluate how well a candidate did and of course figure out where you are going to look for dates!

Some useful resources when you are looking for help are:

- Colleagues, peers and friends who have had good experiences with their current or prior Virtual Assistants. For example, if you belong to a coaching community reach out to your peers and ask for recommendations.
- Craigs List (<http://www.craigslist.org>) is an especially good idea if you want to work with someone local. Do bear in mind that there is a fee for formally listing jobs.
- The standard places for finding temporary help, like Elance (<https://www.elance.com>), oDesk (<https://www.odesk.com>) and Fiverr (<http://fiverr.com>).
- More specialized listing services such as VAClassroom (<http://www.vaclassroom.com/rfp.aspx>), the Thrive Job Board (<http://thrivehiringsystem.com/hire/>) or the International Virtual Assistants Association (<http://www.ivaa.org/?page=SubmitRFP>) are a good source of VA help as they have thriving training businesses focused in this specific area.

So here are your dating action steps ...

YOUR ACTION STEPS:

- Make a list of everything you'll use to evaluate how well a potential candidate does the job and whether you would want to work with them again (criteria).
- Describe your project as completely and succinctly as you can - you should be able to create a bulleted list of what you want potential candidates to do for you. Your description should also include your vision of what the end result will look like and what it will help you do in your business that you can't do right now.
- Decide where you are going to look for your date - through someone you already know or through a more specialized resource. Now you know what you need help with it becomes much easier to look at people's online resumes/skill-sets and know if they are the right fit for what you need.

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Step 4: Put Yourself in Their Shoes

One of the problems with overwhelm is it puts us in to a state of panic, which in turn makes it very hard for us to be clear in describing how or what we need help with. We have a tendency to make what we are describing very big and scary because that's exactly how we are feeling - not so easy to jump out of this cycle!

We've started to address this by recognizing our overwhelm, chunking the problem down into smaller more manageable pieces and getting really specific about what we want help with. This alone makes it much easier to breathe and get some perspective.

Continuing in the vein of perspective, what I've found to be really helpful in getting a complete picture is to take a look at what I am asking someone to do from "their" perspective. Many of us have heard about "stepping into someone else's shoes" - and this is exactly what I want you to do.

I know it might seem crazy because "surely if I knew what their perspective was I'd be able to do this myself". And this is exactly the trap we fall into. It really doesn't matter how something gets done, more importantly that it delivers your outcome. And likely the problem you have is lack of time NOT lack of skills or learning ability :-)

If it really is too hard for you to think about what you are asking from someone else's perspective, my Plan B is for you to "phone a friend" and talk through the project with them to see if you have thought about this from all angles.

Onwards to ...

YOUR ACTION STEPS:

- Pull together everything you have mapped out about your mini-project and read through it all 3 times: once from your own perspective, once from "their" perspective (as if you were the person doing the work of the project) and then again from your own perspective.
- Update your notes with anything you have discovered by doing this review
- NOTE: If "putting yourself in their shoes" is really too hard then phone a friend and talk them through your project and get their input. It's amazing how clear we can get when we need to explain whats in our head to someone else :-)

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Step 5: Get Clear on How You Want Them to Work

You've already decided how you are going to evaluate the person who works on this mini-project for you - your criteria from Step 3. That really is all about "what" needs to be done. Our final step is all about setting our own expectations about what we want from the person we hire and how specifically we are going to approach that relationship.

This is not about "how" to get the job done - it's all about "how" you will work together.

There are many things that you know about yourself and how you work, that your prospective VA has no clue about - yet!

Rather than test your prospective VA on their ability to figure you out, you are actually testing them on their ability to do the project. So it's really helpful to take away some of the uncertainty from the process and let them know up front about your working style and what you expect from them as they work on the project for you.

So here are ...

YOUR ACTION STEPS:

- Think about your own working style: what makes you happy and what drives you nuts. Try and distill out 3-5 key elements that you believe it would help your prospective VA to know about you and the way you work
- Think about someone from your past that you have had a good-to-great working relationship with. This would be someone who has done work for you. Try and distill out 3-5 elements of how they worked with you that made the experience so enjoyable and/or productive.
- Create your "expectations list" based on thinking about what it's like to work with you and add that to your project documentation.

The guiding principle with this last step is to set someone up for success rather than failure. If any of you are students of improv you'll recognize this as the technique of "making your partner look good". There is no point in tripping someone up when you're working with them because that can backfire on everyone.

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In Conclusion

First of all I want to say thanks for staying the course and reading through to the end of this guide. Our time and attention are precious things and I realize that these few sheets could end up on a pile of things on your desk, never to be looked at again.

However, if you do work through my suggestions in this guide, you will have the perfect set of information to guide you in your search for an Outstanding Virtual Assistant!

Also, if I have nudged your brain in any way to look at things even just slightly differently I will have done my job here and achieved my outcome, which is to get you working smarter rather than harder :-)

Mostly that means spending a little more time thinking about what you want to do rather than just jumping in and doing it. I am certainly not advocating that you go all “analysis paralysis” - just that some judicious thinking will take you a long way to getting what you want.

I feel a quote coming on here:

Thinking is the hardest work there is, which is probably the reason why so few engage in it. (Henry Ford)

And if you have a success with this process or have any questions to ask me - just zip on over to my website www.thecalistogroup.com and drop me a quick note.

Warmest Regards

Lynn

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