Steps to Success: The Ultimate Guide to Becoming a Virtual Assistant

Strategies for Finding Clients and Responding to a Request For Proposal (RFP)

Paula Farthing & Laurie Cantus
Virtual-Assistant-Training.com
Version 2010.10
During my school years when someone asked me what I wanted to be when I grew up I always told them I wanted to be a secretary. Not a nurse, or a teacher, or a million other things that I could have chosen, but a secretary. I even remember writing that on the forms that the guidance counselor asks you to fill out. Little did I know then that I would become the “secretary” to many small business owners and actually create my own business (http://www.AdminAtYourService.com) around my love of being the worker bee and computer geek. The mind is a powerful thing – you really can become what you think about most!

The quote “Find something you love to do and you’ll never have to work a day in your life” by Harvey McKay is a quote that I live every day of my life. I’m doing the type of work that I really enjoy and creating a lifestyle that most only dream about. I’ve found so much satisfaction in my business that I started a local group (http://www.SoCalVAGroup.org) to provide support and advice to current and aspiring VAs as they work to grow their own businesses and to educate the local business community about the work that VAs do.

If you are like me and you find that you are actually happy learning new software, can spend hours in the office supply store, consider your computer use one of your main hobbies, and are perfectly content to work on your own, you may find that becoming a virtual assistant is the perfect fit for you too. My hope is that this new site will help many others create the life of their dreams as well. I wish you much success in your journey.
I've always been a supporter. A helper. For everything. As far back as I can remember, I always LOVED being part of a support team. It's always been this way for me - from coaching little riders at my horse-back riding lessons, to working with kids in my karate class, to volunteering at our local hospital as a candy strip. I really enjoy receiving the appreciation of others, which naturally led me to a career as an executive assistant.

I amassed over a decade of high-level administrative experience in the fast-paced industries of fashion and telecommunications before launching my successful VA business, Go2Girls (http://www.yourgotogirls.com) in August of 2006. I have supported decision-makers at all levels of the corporate ladder, from mid-level managers to C-level executives. Prior to entering the corporate world, I spent over 12 years in the United States Army, where I was exposed to a myriad of exciting and challenging situations. Through these experiences, I developed superb organizational skills, creative approaches to problem solving, and was able to work with diverse groups of people from all walks of life.

As a mom, I intimately understand the reasons that more and more women are seeking a way to leave the traditional 9-5 world, and launched Go2Girls after struggling with many of those same issues. Today I am able to work from home and enjoy my husband and son. I get to focus my energy on the things that are important to me – my family, and my own business and projects. I consider it a privilege to encourage other women who seek to make virtual assisting their path to personal freedom.

I am a member of Toastmasters, IVAA. The SoCal VA Group.
I WANT TO BE A VA, BUT HOW DO I FIND CLIENTS?

Once you are a business owner, you also get to become the marketing expert for your own business. Marketing yourself is a critical component, because this is how you will acquire clients. As your VA business develops, your clients will likely come from referrals and word-of-mouth recommendations, but you will still want to have a marketing strategy in place. Through consistent marketing efforts, you will avoid the surges and lulls with client work, and you will start to build a recognizable brand.

Face-to-face and online networking are two ways to spread the word about your business and meet potential clients. People hire people that they know, like and trust. If you are hiding in your new home office and relying on your Web site to bring you clients you are going to be very disappointed. It’s pretty hard to build a relationship with anyone that way, so let’s take a look at some of the ways you can connect with potential clients.

IN PERSON NETWORKING EVENTS

For many VAs the idea of networking is scary, especially to the new VA. The best strategy for in person events is to go there with the intention of helping others, not to sell your services. The most important thing you can do is to LISTEN to the people that you meet and find out what they do, what they need, and how you can help them. When you are less concerned with “making a sale” you are able to be more relaxed. When you take the time to help
Steps to Success: The Ultimate Guide to Becoming A Virtual Assistant

someone, that person is more likely to be open to hearing what it is that you do and what you may need help with.

Another really important thing to remember is that running around the room trading business cards is a useless exercise. It does you absolutely no good to return home with 100 business cards and not know a single thing about any of the people that gave them to you. As one of my clients likes to say, “if you just gather a bunch of business cards you won’t know if Pat or Chris is a male or female when you get home and go through them.” The best thing you can do is take some extra time to get to know a handful of people that you feel a connection with and don’t worry about trying to meet everyone. Feel free to make some notes about the person on the back of their business card so you will remember them later. You can then follow up with them later via email and perhaps give them some additional feedback on some of the things you discussed or invite them for coffee to get to know them a little better. The key to networking is not how many people you know, but how many people know you.

Some of the places you may go to network are your local Chamber of Commerce, BNI, NAWBO, or you can check http://www.meetup.com for listings of groups in your area.

ONLINE NETWORKING

Social networking sites also provide a great opportunity to connect with potential clients. They are generally very inexpensive and most are free, but with a little bit of effort they are a tremendous way to build your business. At the very least,
be sure to post a profile about you and your business on two of the biggest networks, LinkedIn and Facebook. Networks have different functions, but generally choosing to be present and profiled on Facebook, LinkedIn and Twitter is a good rule of thumb. Be sure to include a bio, a picture, a description of your services, and your contact information. With social networking, being engaged is the key. Take time to join LinkedIn Groups that would be of interest to your target market and be active in the discussions of those groups. Another great strategy is to visit the Q&A area of LinkedIn and establish yourself as an expert in your field by answering questions in your area of expertise.

Plan to block out about three hours each week at the beginning to accept new friends, followers, and connections and respond to those who discover (or rediscover) you. Be sure to take the tutorials for each community to learn the basics of how to build your network and send announcements.

Whether you want to promote your business or just participate with like-minded people or peers in the VA industry or your specific niche, the virtual world is virtually unbeatable. Finally, for those VAs who become adept at social networking, doing this for your clients can be a great source of income. For those new to social networking VA Classroom has a great Social Media Marketing course as well as training on Facebook, blogging, Internet marketing and a variety of other programs. These programs are highly recommended and the social networking sites within the courses are also a great way to connect with other VAs.
Another way to market your business is by writing articles. There are two paths to accomplish this. You can write traditional business articles to be published in a local publication, such as a Chamber of Commerce newsletter or your local paper. Writing articles establishes you as an expert in the area that you write about. This can generate interest in you and your business. The second avenue for article marketing is through online articles. You can write articles and then submit them to places for other to use in their ezines etc. You do not get paid for their use, but the user must keep the author’s biography and contact information intact so be sure to include a link to your Web site in your bio. This will drive traffic to your Web site and generate interest in you and your business. There are LOTS of article databases out there and we have provided some of our favorites below:

- www.ezinearticles.com
- www.articlecity.com
- www.Goarticles.com
- www.Buzzle.com
- www.Articledashboard.com
- www.Articlealley.com

Posting to a blog on your Web site is a great way to get noticed and get some traffic coming to your site. We suggest working with a WordPress blog as that is the most popular blogging platform. By writing current, relevant and helpful content for your target audience you can establish yourself as an expert, let others
get to know you, and highlight your skills and services. This is a great way to connect with potential clients if you are comfortable with writing and have the time to create fresh content on a regular basis.

**PRINT ADS**

Another way to promote your business is through traditional print ads. While we don’t recommend taking out an ad in People magazine or the Sunday Times, we will caution you to not discard the idea of a printed advertisement. Think of publications that your community or business colleagues might read and recognize you as a person they’ve met or heard of. Some ideas are the Chamber newsletter, your church or synagogue directory, or a publication published by your child’s school.

**DIRECT MAIL**

Direct mail can also be a way to connect with clients. You could mail post cards to contacts at previous employers, friends, family and local businesses outlining the services you offer and providing your contact information. You might even try to mail a monthly letter outlining strategies for local small business owners. With direct mail, you need seven or eight contacts with someone before they will remember you, so it can get a little expensive in postage, but it can definitely pay for itself with a couple of new clients.
CRAIGSLIST

We have heard mixed reviews about using Craigslist, but it can be a place to find clients. It’s free, so the only thing you lose is time if it doesn’t work for you. You may get a lot of junk and spam responses when posting on Craigslist, so you may want to use an email address set up specifically for that purpose, but you may find that you pull a client from there every once in a while. We suggest that you sign up for a free Craigslist account. This makes posting and taking down ads very easy because you won’t have to verify each ad before it goes up.

OTHER VIRTUAL ASSISTANTS

Believe it or not, other VAs provide very good networking opportunities. VAs, as a general rule, are a very supportive group of professionals. If you join a large VA networking group, such as IVAA (www.ivaa.org) or VANA (www.vanetworking.com) and become involved with the other members, you can easily establish yourself as someone to be counted on, or who has a particular skill set. Then, when other VAs need assistance with clients or projects, you can be uniquely useful. If you’re already well known on the various VA forums and have built a great reputation or core of peers and fans, people will be far more likely to want to work with you. Also, there are often local VA Connection groups that meet regularly. This is a good place to meet other VAs, not only to talk about your challenges and successes, but also to get advice and work! VAs will often refer
work to other VAs when something comes up that is not in their particular skill-set, or something that they don’t have time to do themselves!

We know several VAs that have filled their practice to capacity solely by subcontracting for other VAs that had an overflow of client work. Since multi-VA businesses (where the lead VA has team members working with them to provide services to their client base) are becoming more common, there are many opportunities to work with other VAs as part of their team.

**VOLUNTEERING**

Volunteering with local organizations is also a great way to showcase your skills and get to know people in your community, not to mention how great you are going to feel that you are helping others! There are also opportunities within some of the VA networking groups as IVAA and VANA both use volunteers to help with their forums, events, and day-to-day activities. This is also a great way to showcase your skills and get to know your fellow VAs.

We have given you quite a few ways to connect with potential clients, so pick a couple that resonate with you an try them out for a bit to see what works best for you. If a particular idea isn’t working for you, switch it out and try one of the other methods until you find the right combination for you and your business.

In our next section, we will take a look at the Request for Proposal process.
WHAT IS AN RFP?

A Request for Proposal is a post that a potential client submits outlining the tasks or projects that they need assistance with, as well as the skills and sometimes the background required to perform the work. Both IVAA and VANA, two popular VA groups, post Request for Proposals for their members on their Web sites. Learning how to properly respond to RFPs can make a huge difference in how quickly you get your business up and running with paying clients.

TIPS ON RESPONDING TO AN RFP

While there is no standard template to use when responding to an RFP, there are some important guidelines you should follow to frame your response. We strongly recommend that you refer back to this list whenever necessary in order to be guided through the process properly.

➢ **Read the post thoroughly**, before beginning to respond, in order to determine *exactly* what information the poster is looking for. If you fail to provide the specific information the poster has requested, you are guaranteed to be excluded from the selection process right away. Often, this is a benchmark or even a test, because the person posting wants to determine whether or not you can follow directions. **DO NOT use the same canned responses and submit those to every post.**
Steps to Success: The Ultimate Guide to Becoming A Virtual Assistant

- **Be brief, but highlight the benefits of choosing you over everyone else.** Your responses will usually end up being only one page, unless the person posting the request specifically requests more detail, or is requesting a lot of information or background details up front. Generally, if someone is looking for a virtual assistant they are already overwhelmed. Burying them under six pages of text is not going to give them a good feeling about you. Your job is to make things easier, not harder.

- **Be positive and confident in your response,** and give specific details and “deliverables” that demonstrate why you should be their final choice. Consider attaching one brief testimonial.

- **Know your audience.** Research the person or company who posted the RFP. Other VAs often post RFPs when they need subcontractors to help them with their workload. It doesn’t help you or them if you spend an entire paragraph explaining what a VA is and how to work virtually. Know your audience and respond accordingly.

- Be sure to use a “clean eye.” Take some time away from your response to the RFP, and go back to read it again after a break. **Check for errors that you may have made, or repetitious wording.** Try to limit sentences that begin with the word “I.” It definitely helps to look at your response from a fresh perspective; you may even want to
Steps to Success: The Ultimate Guide to Becoming A Virtual Assistant

have someone else read it over. Be sure you use spell check before sending it out. We can’t tell you how many times we’ve received responses to RFPs filled with typos or grammar errors.

- If you respond to an RFP and don’t hear back, definitely **follow up after a few days have passed**. This demonstrates that you are still interested, and it sets you apart from the many people who do not take the time to do this.

We have highlighted some basic guidelines. You would be amazed at how many VAs fail to follow these simple steps in order to keep their response from being immediately discarded. Don’t let that be you!

**One more thing...**

Many of the potential clients that post RFPs don’t bother to take the time to send a response once they have made a decision and found someone to work with. Often, they don’t even acknowledge that they ever received your information. That’s a whole different book. Don’t take this personally. Sometimes people will post RFPs just to do some price comparing. 😊 If you do try to follow up, and still don’t get a response, just move on. There are more than enough clients out there for everyone. The client or project you don’t get today, may be your best job or ally down the road. Remember, RFPs may not always land you the job, but often stand for Real Future Possibilities.