Virtual Cathy Service Guide

For EA Services

Welcome

to Virtual Cathy!

It's official! You are one step closer to gaining more hours in your day.

We are thrilled to have the opportunity to work alongside you and assist with your daily administrative tasks.

We are committed to providing you with exceptional support, and we can't wait to get started!

~**The Virtual Cathy Team**

****Before moving forward, make sure you completed steps 1 & 2 in your welcome email so your Virtual Cathy account and New Client Questionnaire are all ready to go!****

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Getting Ready for Your New Executive Assistant VA!

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Prepare for Onboarding!

While you are waiting to meet your EA, here are a few areas to begin considering:

- Tasks you would like to delegate (*anything you can think of - the next section has some ideas!*)
- Which ones are top priority/first to be started
- Ideal timeline for those tasks to be completed
- Programs/software you currently use
- Access/credentials your EA will need
- Best way for your EA to contact you
- Preferred check-in frequency (weekly, bi-weekly, monthly, etc.)

Pro-Cathy Tip!

We find that using a password manager to share passwords with our EAs works best for most clients. LastPass is our Virtual Cathy recommended option!

A great feature is the ability to share access to your programs without making your actual password visible! Check it out here!

LastPass

Common Tasks Your EA Can Do For You!

- Email Management
- Calendar Management
- Client Correspondence
- Run Reports
- Book Travel Arrangements
- Invoice Prep
- Follow-up on Past Due Invoices
- Create SOPs
- Data Entry
- Research Tasks
- Outgoing Phone Calls
- Manage CRMs
- Order Supplies
- Create Thank You Notes
- Follow up on Sales Leads
- Create Templates
- Take Meeting Minutes
- Set up Proposals/Contracts

...and more!

Keeping track of it all!

Your EA can help everyone stay on top of tasks with by:

- building out a project management system *(if you don't have one already)*
- meeting with you to learn how your organization's projects run from start to finish
- creating new templates and automation and/or updating existing ones
- assigning appropriate team members to tasks
- following up on tasks that have not been completed

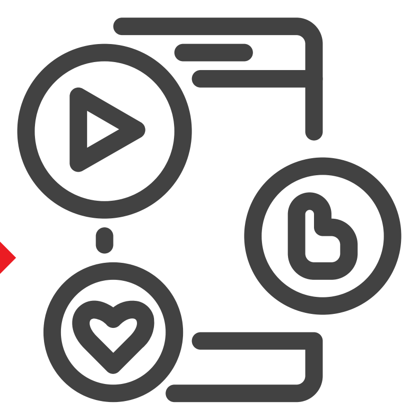
Wait… There's More!!!

Accountability Partnering

- Daily check-in through a messaging platform (Slack, Teams, Voxer, etc.)
- Twice a week task management meeting (typically one at the beginning of the week and one halfway or near the end so there is still time to wrap up tasks)
- On top of project management, they can help with your calendar, keep track of your to-dos to see if anything got missed, and help pace out work so everything gets done!

Social Media:

- Scheduling posts with copy/graphics/schedule provided
- Create graphics & copy with the schedule provided
- Create graphics with templates & copy provided
- Schedule and input blog content
- Create social media templates
- Create a style guide with fonts and branding colors
- Social media engagement, including follows/likes
- Newsletter creation with content provided
- Create newsletter templates



Communicating with Your VA!

The Best Way to Communicate with Your Virtual Cathy

When?

Your Executive Assistant is available to check in with you daily during normal business hours (Monday-Friday, 8-5pm) and will work on your tasks and projects behind the scenes throughout the regular workweek.

How?

During onboarding, let your EA know what your primary/preferred communication method is (email, Slack, Voxer, Whatsapp, Google Chat, etc.) The only exception to the communication rule: we do not communicate through social media account-based messaging services, such as Facebook Messenger, Instagram DMs, etc.

CATHY CUE: Please keep in mind that your Executive Assistant works with other clients as well and won't be able to be available at all times during the day. Scheduling touchpoints and check-ins on a daily and/or weekly basis is the best way to establish a routine! This will ensure effective communication/coordination between you and your EA.

Expected Turnaround Times for Tasks and Projects

Tasks

All regular, daily tasks will be done within the same business day, such as email management, calendar management, scheduling, and more. For any work that comes in the late afternoon that isn't emergent, it will be done at the beginning of the next business day.

Projects

Let's say you have a large project, something that will take 4 hours or more to complete. We request that your EA has at least 48 hours' notice (two business days) to complete the work by your deadline. If you have a rush project that needs to be done in less than 48 hours that we've confirmed we can take on, rush fees will apply.

Pro-Cathy Tip!

Do you have a project management system? This can be a great way to delegate tasks and be able to see the progress your Executive Assistant is making on your task list. Don't have a project management system?! Talk to your EA and brainstorm together if it would be a good option for you, and they can help you set it up!

Support After Business Hours and on Weekends

At Virtual Cathy, we stress the importance of a healthy work/life balance for all of our staff. You are welcome to email or message after hours and on weekends, but please know that your Virtual Cathy will respond the next business day during regular work hours.

Should you have a future project, webinar, or event scheduled after hours or on a weekend that you would appreciate EA support with, it is solely up to your EA and their availability as to whether they can assist you. It never hurts to ask!

If your EA is unavailable, we may have another EA that can help support you after hours. If this is something you are interested in, please reach out to our Director of Operations at rachel@virtualcathy.com so we can try to pair you up with another Cathy!

Virtual Cathy FAQs

Let's talk time travel. I mean, time-tracking. So similar!

How do I know where I am at with my hours?

Great question! For all Executive Assisting clients, we provide a report of hours twice a month -- once on the 1st of each month and once on the 15th of each month. You can also ask your EA for an update of hours at any time.

And remember -- our plans adhere to a "use it or lose it" policy.

All purchased hours must be used within your specific billing cycle. You can expect us to reach out throughout your billing cycle if we don't anticipate having enough work to use up all your hours. It is a HUGE priority for us to ensure your hours are being used fully!

How is the time tracked?

Virtual Cathy tracks time worked down to the minute -- we do not round up or down. This is categorized by task/project, so it is easy to see how the time is utilized within your reports!

Are my meetings with my VA included in the time tracked and applied to my plan of hours?

Yes! Anything we do with you or for you is applied to your plan of hours. That being said, we are all about efficiency. Once the working relationship is established, you and your EA can adapt communication and other processes to maximize productivity. If you find your VA trying to keep the meeting agenda/conversation on-topic, it's only because we want to make the most of your purchased hours!

Let’s dive a little deeper into hours and billing cycles!

When do my hours expire/when is the end of my billing cycle?

We have two billing cycles -- the 1st and the 15th of the month. For those whose billing cycle is the 1st, they have until the last day of the month to complete their hours; for the 15th billing cycle, they have until the end of the day on the 14th.

Whether you are starting services on the 1st, the 15th, or anytime between, we've made the first billing cycle flexible for a few reasons:

1. We want to accommodate the learning curve between the client and VA within the first month
2. Sometimes it takes time to get used to delegating work to your assistant
3. We want to be sure that all of your initial hours are used before your next billing cycle

For example, let's say you start services on the 21st of May. We would review your hours around June 15th, just shy of the 30 days, and see if you still have a handful of hours left to use. If so, we would bump your billing cycle to the 1st to ensure full utilization.

Please note we are only able to flex the billing cycle once. It is a special exception for the start of your services to help ensure your initial hours are used up.

What happens if I have unused hours?

If you get to the end of your first 30 days and you have a decent amount of time left to use, we will bump your billing date to the next billing cycle. For example, if your billing cycle was around the 1st, we'll give you until the 15th to complete your hours. **This is an option only for the first month of services.**

What happens if I go over my hours?

Great news! We will not go over your plan of hours unless we obtain your permission!

There are a few options for you to choose from. When your EA lets you know that your hours have been completed, you can either:

1. Approve and purchase the number of hours you believe will cover the work you need to be done before your next billing cycle; or
2. Pause services until your next billing cycle comes around.

Delegation Done Right.

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Who to Contact Regarding Your Services

If you are having a hard time figuring out what to delegate to your EA...

Don't worry! Having trouble pinpointing specific tasks to hand over or having difficulty with the delegation part may be more common than you think.

First, start by having a conversation with your EA. If you've been working together for some time, they may be able to spot gaps in your administrative processes in which they can assist you or make recommendations.

If you would like a brainstorming session on how to determine what to delegate, we're happy to oblige! Reach out to Melinda, our Director of Business Development, at melinda@virtualcathy.com, and she can get you scheduled to discuss this further.

If you want to add an additional service that is not covered by your current plan...

This is also something to reach out to Melinda about! She can help point you to a new plan or provide you with a custom quote for additional service add-on(s) such as:

- Project management system build-outs
- Landing page creation
- Full-time VA assistance (VIP Cathy services)

If you need to adjust your current hours' package...

Whether you're upgrading to a higher plan or needing to bump your hours down, the best way to make changes is to notify Rachel, our Director of Operations, at rachel@virtualcathy.com BEFORE the end of your current billing cycle as soon as possible.

If you are not "meshing" well with your EA...

While this rarely happens, sometimes personalities clash, or the skillset is not the best fit. And that's okay! Our top priority is for you to feel supported in your business.

Start by reaching out to Rachel. From there, we can figure out if further training may be needed for your EA to help get everything heading in a positive direction. Alternatively, we can swap out your EA for someone else on our team who may be more successful in helping you feel supported with your tasks.

Additional questions?

While the majority of the communication will be between you and your EA, if there is anything we can help with, we encourage you to reach out!

Virtual Cathy is here to support you in any way we can.

Thank you for trusting us with your business!

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Virtual Cathy Resources

Privacy Policy
Terms and Conditions
Your Virtual Cathy Account
Virtual Cathy Packages

"Cathy and her VAs are absolutely fantastic! I was paired with a number of different VAs over time as my needs changed, and each selection was perfect. I am so happy with the work Virtual Cathy has done for me and how my business has grown with their support! Thank you!" -Georgia Mountford-Blake