

Quick Reference Guide

Process, Systems & Organization Best Practices for Your VA Biz

The following list of best practices is simple *and* realistic. Remember that investing time and energy into developing and maintaining sustainable processes and systems that keep your business organized sets you up for success!

1. Business Plan & Goals

- a. Create task reminder to review your business plan annually.
- b. Create task reminder to set business (and personal!) goals once a year, with a reminder to review/revise quarterly.
- c. Start a document where you can make quick notes of items you want to add/review/change.

2. Business Processes

- a. Make a list of your operational procedures i.e.: client intake, marketing, networking, social media activity, time keeping/billing.
- b. Outline each task or action item involved in each process.
- c. Create [templates and documents](#) you need for each of your systems and processes.
- d. Create task reminder to review quarterly.
 - i. Scan your files/emails to see if you have any new processes you have not outlined or any new steps within your processes that need a template or document.

*Note: Having a core set of business processes and documents to manage operations from day-to-day means you spend less time “re-creating the wheel”, giving you more billable time for your clients. If you need simple, affordable and customizable virtual assistant templates and tools for your business, visit the all new [E.V.A. Resource Shop!](#)

3. Business Resources

- a. Create & maintain database to track your memberships, system access, affiliate programs, etc.
- b. Data: Name of system/organization, URL, login/password, cost, expiration date
- c. Password protect your file.

4. Client Systems and Processes

- a. Document the information and steps needed to complete tasks you manage.
 - i. Sample information to include: client name, software program, website address, login/password, file location, timeframe, action steps
- b. Create task reminders for recurring tasks.
- c. Create one password per client to protect files with confidential data.
- d. Create task reminder to review client support services and documentation quarterly.
 - i. Scan your files to see if you have any new tasks you have not outlined.
 - ii. Review the steps within your current documentation for necessary updates.

5. Marketing Materials

- a. Create task reminder to review your marketing materials/website at least twice a year.
- b. Start a document where you can make quick notes of items you want to add/review/change.
- c. Bookmark websites that spark your creativity and give you new ideas (but don't copy!).
- d. Ask friends/trusted colleagues for feedback before you implement.