



INTERIOR DESIGN  
STANDARD

# How to Onboard and Leverage A Virtual Assistant

(to create more time and freedom!)

By Sandra Funk

**...and create space for you to focus on  
CEO-level tasks in your business**

**I knew that if I wanted to scale, I couldn't "do it all" by myself.**

One of my favorite business mantras is "Clarify and Delegate" and what better way to do that than with a Virtual Assistant?

Virtual Assistants (VAs) make the world go round at House of Funk.

From managing the schedule to client communication to project management, they bring their expertise and save our leadership team hours of work every week. When you strategically leverage your virtual assistant, their role can go far beyond admin tasks.



## Perks of hiring a VA

- The pool of applicants becomes much wider when location is not a factor
- There are a ton of services to help you find your perfect VA (shout out to BELAY and Elite Design Assistants)
- You can scale their hours to your workload as the year rolls on (saving you time and money)

If you're feeling overwhelmed, I encourage you to take this step and make the hire. You've got this!



# What needs to be delegated?

## Not for me...

What tasks do you hate doing (aka what do you procrastinate the most?)

## Time suck...

What tasks are you passionate about, but not proficient in?

## Depleting...

What tasks are you skilled at, but not passionate about?

## In my element...

What tasks do you love doing that also move your business forward (keep it CEO level)

# Virtual Assistant Job Posting

**Here's an example VA job posting. Take it and make it your own.**

**We are seeking a virtual assistant with excellent written and oral communication skills.**

This person will need to organize and supervise all administrative activities, which facilitate the smooth running of the business. They will be expected to carry out a range of administrative, procurement, IT-related and administrative tasks. Ultimately, this candidate would be responsible for ensuring the virtual office runs efficiently.

This is an autonomous role for a self-starter.

We provide training, mentoring, a collaborative community, systems and a robust business structure to support you.

This is a unique opportunity to join our innovative, professional, top-quality team.

## **Roles and Responsibilities**

The following is intended to describe the general nature and level of work. Other duties may be involved. A full role description will be provided.

- Manage CEO's email
- Check and sort virtual mailbox
- Monitor and order office supplies (business cards, stationery, ink cartridges)
- Research, establish and maintain relationships with vendors (florists, caterers, insurance carriers, etc.)
- Schedule vendor presentations
- Research, procure and maintain business software
- Manage office calendar and CEO appointments
- Manage Google Drive and file docs in correct areas
- Organize and maintain a detailed list of contacts, cross-referencing excel, and design software
- Interfacing with business and personal contacts (including on the phone, in-person, and over email) in an polished, professional, and discreet manner

# Virtual Assistant Job Posting (Continued)

## **The ideal candidate:**

- Lives and breathes organization and communication
- Wants autonomy over their role
- Self directed and happy to manage multiple projects
- Comfortable communicating with internal and external parties
- Not only understands the importance of organization, systems and processes but loves to use them to keep their projects joyful and efficient
- Has an upbeat personality and a positive attitude

## **Requirements**

- Minimum of 2 years experience supporting executives
- Bachelor's Degree
- Outstanding communication skills
- Ability to focus on multiple projects in various stages of development
- Ability to work autonomously
- Experience communicating with external vendors and trades
- Experience calendar management
- Experience email inbox management
- Reliable computer and WiFi to utilize our web based systems
- Experience with task management software such as Asana

To apply, send us your resume a short cover letter as to why you'd be a great fit for this role.



# Onboarding Your Virtual Assistant

By filling in the following, you're equipping your VA to execute tasks on your behalf: Share as much information as you are comfortable with - but keep in mind - the more you share, the more efficient your VA can be. This is also why using an agency that does background checks and training is my favorite way to VA.

## **BASIC INFO**

First Name

Middle Name

Last Name

Cell #

DOB

DL#

Personal Credit Card

Business Credit Card

Address

## **TRAVEL PREFERENCES**

Preferred Airlines

Seat Preference

Service Preference (First class, Business, Coach)

Connecting flight okay? (Y/N)

TSA Pre-Check #

Global Entry #

Airline Rewards

Name as it appears on passport

Passport Expiration Date

## **OTHER**

Clothing Size

Favorite Color

Favorite Stores

Hobbies/Interests

Allergies/Dietary

# Virtual Assistant Onboarding Checklist



Block time for you and your VA to get acquainted with the following:

Company mission and vision

Team members

- Roles and responsibilities

Company vendors

- Accountant, lawyer, web developer, tradespeople

Current projects and clients

How to access company logins and passwords

A tour of your task management system, digital filing system, design software and any other digital tools

Your design process and where you envision them assisting

How the calendar is currently managed

Upcoming events, meetings and travel for them to be aware of

Initial tasks for them to tackle



# **The Weekly One-on-One Agenda**

Have your VA come prepared to your weekly meeting with the following agenda items. Adjust as needed based on your business and relationship.

## **Review Things Coming Down the Pipe**

What's on the horizon that we need to be planning for?

## **Review and Plan**

What's working and what's not working?

Anything we want to try differently?

\*This feedback works best if you actively give input BOTH ways every week. Constructive feedback is like a muscle, it gets better when used regularly.

## **Talk about:**

- Personal
- Home
- Work
- General
- Task list review – what can be delegated (Remember my Mantra - Clarify and Delegate - I try to move all tasks that could be done as well or better than I could do them off my list.)

**Review Last Week's Goals - How far did you get? What worked and what didn't work?**

**Determine This Week's Goals**

**To-Dos (put straight into Asana)**

## 3 Things to Delegate to Your VA Immediately

### **Gatekeeping Communication**

Have your VA manage your email inbox. If your personal and business email are one in the same (because who has time to manage two emails?) you may be worried about them reading your personal emails. Set parameters, for instance, my VA stars emails for me to tackle once daily that are from my immediate family and are clearly personal. The rest, she handles. My theory is to trust your VA 100%. The more you let them have your back, the better they can serve you. If they break that trust, they are not the VA for you. Remember, everyone that you work with should have the same mission, vision and values as your business.

### **Manage scheduling — Communication and Logistics**

Give your VA the reins to take over scheduling. Sit down and determine your ideal calendar. Decipher which days are best for client meetings, which days are best for big picture thinking and which days are best for reviewing your finances. If you haven't seen it, I discuss the flow of my weekly schedule in Design Sips - The 7 Figure Mindset. Let your VA schedule your appointments, communicate with vendors, etc. Just wait - it's a game changer to have this off your plate!

### **Research and Info Collection**

Your VA is your go-to for all things research. If they love their job, then they also love Google. From where to find custom upholstery vendors to the best receivers in the area, they can be the one scouring the web and Facebook groups, collecting this information for you.

## Other Tasks to Consider Giving to Your VA

The possibilities are endless. If there is a task that you do not love or just aren't good at - delegate. We all have different strengths and they should be utilized accordingly.



- Take meeting notes and create agenda outlines
- Make follow up calls and send follow up emails
- Open trade accounts
- Manage your virtual mailbox
- Confirm all appointments and meetings
- Onboard new employees
- Proofread design deliverables
- Organize and manage your Google Drive
- Source high quality images for design presentations
- Test run tech for virtual presentations
- Draft newsletters and social media posts
- Update your social media channels
- Make online purchases
- Assist with thank you notes and gifts
- Order stationary and office supplies
- Manage testimonials and referrals
- Take initial potential client calls and do the initial vetting

## Ready to onboard your first VA?



**Check out the following Virtual Assistant companies House of Funk has used personally and recommends.**

**BELAY**

<https://belaysolutions.com/>

**VALATAM**

<https://valatam.referralrock.com/I/1SANDRAFUNK62/>

**ELITE DESIGN ASSISTANTS**

<https://www.elitedesignassistants.com/>

[Disclosure: Some of these links are affiliate links. Using them may send a commission our way – at no extra cost to you, just fuel for our next designer-focused endeavor destined to elevate our industry.]