

Almost 100 Ways How a Virtual Assistant can help Sales Professionals

The following list describes various ways Sales Professionals are utilizing virtual assistants (VAs). This list is published to give you ideas on how they can benefit from the services of a VA. It may also give existing users of VA's some new ideas or thoughts on how to expand the use of their VA. Remember, all documents created by or used by a VA can be quickly and easily transmitted via e-mail attachment, FTP, fax, or delivery of diskette or hard copy using overnight delivery, priority mail, or regular postal services.

Secretarial Services

1. A client needs to confirm sales appointments made for the week. The list is faxed to a VA. The VA calls the appointments and notes who has confirmed and who must be rescheduled. The list is faxed back to the client.
2. A client needs directions to a prospect. The VA calls, obtains directions, and e-mails the directions to the client.
3. A client has routine paperwork that must be filled out on a daily basis (e.g., sales call recap). The client calls a VA with the information. The VA fills out the form and faxes or e-mails it to the home office.
4. A client makes a backup tape of computer files and sends it to the VA for safekeeping—a small task, but well worth it: In the event of a disaster, all the files are located off the premises.
5. A client travels frequently and needs a VA to coordinate air travel, car rental, and hotel reservations.

Research

6. A client is selling business success tools and seminars. The client has the VA research a target industry. Once a list of companies has been prepared, the VA calls to identify a contact individual. The VA prepares and mails introductory material. After a specified time, the VA calls to verify that information has been received and to schedule a sale appointment.

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7. A client needs a hotel conference room for a seminar and telephones a VA to do some research. The VA contacts several hotels in the area to determine availability of a room on the date in question that meets the size and other requirements of the seminar. The VA obtains written quotes from the hotels that can accommodate the request. The VA reviews each quote for completeness and reports the findings to the client.
8. A client needs CD-rom duplication and e-mails a VA with the assignment. The VA calls several vendors and obtains written quotes for the project. Upon approval, the VA coordinates sending the original CD-rom to the vendor, designs and prints labels, receives the completed order, attaches the labels, and sends the package to the client.
9. A client needs to buy some office equipment and e-mails a VA with the request. The VA calls several vendors, obtains pricing information, and e-mails the information back to the client.
10. A client needs software to do mail merge in e-mail. The VA researches on the Internet and inquires among business networking groups about such software. When the software is identified, the VA contacts the vendor to verify mail merge capability, the price, and availability. The VA then reports the findings to the client.
11. A client is interested in what competition exists online. The VA can do a keyword search and list the appropriate web sites and findings back to the client.
12. A client is preparing an advertising plan and e-mails what further information is needed. The VA contacts possible advertising places on the Internet and in magazines, periodicals, newspapers, and so on, and acquires information on pricing, publishing dates, publishing deadlines, payment policies, and so on. All information is compiled into a report for the client to review.

Word Processing and Presentations

13. A client takes notes at meetings and needs them typed. The client faxes the notes to a VA, who types the notes.
14. A client is preparing a report and needs the draft copy to be formatted. The client sends the document via e-mail attachment to a VA. The VA edits and formats the document and returns the finished report via e-mail attachment.
15. A client writes a letter and faxes it to a VA. The VA types the letter, prints the letter on the client's stationery, and mails it.
16. A client needs a manual typed. The client mails the document to a VA. The VA types the manual, saves it to disk or CD-rom, and mails it to the client.
17. A client is preparing a seminar and needs a PowerPoint presentation prepared. He or

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she faxes sketches of diagrams and charts to a VA. The VA prepares the PowerPoint slides and sends the document to the client via e-mail attachment.

18. A client is preparing a seminar and needs a questionnaire fact sheet from each participant prior to the seminar. The client faxes the questionnaire along with a list of participants to a VA. The VA types the questionnaire; calls each participant, obtains their fax number, and faxes the questionnaire; tracks each completed questionnaire and calls the participants who did not respond on time; summarizes the questionnaire responses on a report; and delivers the report to the client via e-mail attachment.

Data Processing and Database Management

19. A client collects business cards all month long. At the end of the month, he or she mails the collected business cards to a VA. The VA enters the data into the client's database, zips up the file, and returns the database to the client via e-mail attachment.
20. A client e-mails all new prospect leads to a VA. The VA enters the information into a contact database and, using mail merge, sends an introductory letter. The VA monitors the marketing follow-up program, sending a predetermined marketing piece every two weeks. Each week the database is sent to the client via e-mail attachment so the client has a record of the transactions. When a prospect responds, the client e-mails the VA to remove them from the active marketing follow-up program.
21. An insurance agent faxes new policy owner information to a VA. The VA enters the information into the client's database, zips the file, and sends the database to the client via e-mail attachment. The VA also prepares and mails a standard confirmation letter to the policy owner. The VA tracks the annual expiration date of the policy and, upon the due date, sends a reminder e-mail to the insurance agent.
22. A client is preparing a direct mailing and needs to verify his database. He or she sends the database to the VA via e-mail attachment. The VA telephones each name and verifies the name, spelling, title, and address. The VA makes all corrections, deletes old names, and adds new names. The corrected database is zipped and returned to the client via e-mail attachment.
23. A client is preparing a fax broadcast but has an incomplete database. The database is sent to a VA via e-mail attachment. The VA telephones those missing fax numbers and obtains the correct number. The updated database is returned to the client via e-mail attachment.
24. A client faxes copies of business cards he has gathered at a presentation to a VA. The VA enters the information into a contact database, uses mail merge to produce a follow-up letter, uses a signature font (and signature color ink) to sign the client's name, and mails all letters.
25. A client is changing database software and needs to convert his databases. A VA can

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handle the conversion.

Desktop Publishing

26. A client needs a price list, product list, brochure, or schedule prepared. A VA can design, type, and prepare such items and use a variety of paper stock, clip art, or client-provided art.
27. A client needs a certificate for an employee of the month, an awards ceremony, a membership certificate, or participants completing a seminar. The VA designs and prints certificates and may use predesigned paper stock, seals, and/or ribbons. The completed certificates are delivered to the client to disperse as needed.
28. A client wants to publish a quarterly newsletter. The client provides the content and the mailing list to the VA. The VA types and prepares the newsletter, prepares labels, and mails the newsletter.
29. A client is distributing a CD-rom in a mailing and wants the company logo to be included on the labels. The VA can design and print labels using client-provided art, attach the labels, and coordinate the mailing or shipping.

Transcription Service

30. A lawyer sends microcassettes of a report via overnight delivery to a VA to transcribe. The VA types the report and sends it back to the lawyer via e-mail attachment.
31. A client needs a telephone conversation (e.g., conference call, teleclass, etc.) recorded. The VA records the call and transcribes the tape for the participants.
32. A client dictates letters and memos onto a cassette tape and mails it to the VA via overnight delivery. The VA transcribes the tape, prints the letters on the client's stationery, and mails them the following day.
33. A medical professional sends a report recorded on cassettes to a VA to transcribe. The VA types the report and returns it via overnight delivery.

Mail Service

34. A client who travels frequently returns to a stack of mail and sometimes misses important correspondence. All mail can be forwarded to a post office box near a VA. The VA can retrieve and review the mail, fax or overnight deliver urgent items to the client's hotel, respond to routine matters, and forward items to the client's office that can wait for the client's return.

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35. An international company may need mail service in the United States (or other country). All mail is forwarded to a post office box near a VA. The VA retrieves all mail, sorts it, responds to routine requests, and forwards the remaining items to the client. To save on postage costs, the items may be scanned and delivered via e-mail attachment.
36. An international company is preparing a mailing to prospects in the United States (or other country). By using a VA in that country, all mail can be delivered with domestic postage.
37. A client needs fulfillment services for books, tapes, or other materials. As orders come in, the client e-mails or faxes the VA with the information. The VA prepares the package and mails.

E-Mail Service

38. A client cannot keep up with the volume of e-mail and is missing important messages. The client sets up a general e-mail account (info@mycompany.com). The VA retrieves all e-mail to this address, sorts it, responds to routine requests, and forwards items of importance to the client at his or her personal email account (myname@mycompany.com).
39. A client is going on vacation and doesn't want to miss important e-mail messages. The VA downloads all e-mail and notifies individuals that the client is out of the office. The VA contacts the client with urgent messages.
40. A client has or wants auto-responders on his or her website. The VA can write and setup the auto-responder. The VA can also monitor the number of requests and establish a database of who is requesting the information.
41. A client wants to fully utilize their e-mail software program (e.g., filters, auto-reply, signatures, etc.). The VA can walk them through the setup and teach the client how to do this over the telephone (while on the computer at the same time).

Telephone/Fax Service

42. A client is going on vacation but needs to stay in touch with important business calls. The client records on his or her voice mail that urgent calls may contact his or her assistant and include the VA's telephone number. The VA can then contact the client with important messages.
43. A client is leaving on a business trip but doesn't want the phone to be left unattended. The client activates call forwarding to the VA's telephone and gives the VA the business itinerary. The VA answers all calls, responds to routine requests, and contacts the client with urgent messages.
44. A client is frequently out of the office or travels and cannot check voice mail on a

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regular basis. The VA calls and retrieves messages from voice mail, responds to routine requests, and contacts the client with urgent messages.

45. An international company needs a contact in the United States (or other country). Due to different time zones and costly international long-distance phone charges, it is difficult for prospects to contact the international client. Using a VA in the United States (or other country), prospects can easily call for information. If a question arises that a VA cannot answer, the VA e-mails the client for further instruction. In some cases, a separate phone line may be installed for the VA to answer.
46. A client is going out of town but needs to respond to any faxes received. The client places call forwarding on the fax machine to ring to the VA's fax machine. The VA handles the fax requests and contacts the client with urgent messages.
47. A client wants a human voice to answer the phone. A separate phone line is installed at the VA's location to be answered with the client's company name.
48. An international company sends many faxes to prospects in the United States (or other country). To save on international long-distance charges, the client uses a VA to send faxes from a domestic location.

Internet Services

49. A client operates an automated e-mail mailing list or newsletter. Although it is automated, the client still receives incorrect subscription requests or failed mail messages. The client forwards all related e-mail messages to a VA to correctly process the requests to subscribe, unsubscribe, or delete bounced e-mail messages.
50. A client operates a manual e-mail mailing list or newsletter. The VA manages the e-mail database, adding subscriptions, deleting those wanting to unsubscribe, deleting failed mail addresses, and posting announcements or the newsletter to the list.
51. A client is trying to locate a hard-to-find item. Using the Internet, the VA can perform a search to try to locate the item.
52. A client needs changes on his or her web site. The VA can edit or upload new information to the client web site.
53. A client needs to promote his or her web site. The VA can submit the URL, keywords, and description to various search engines on a routine basis.
54. A client wants to increase the number of subscribers to his or her electronic newsletter. The VA can list the newsletter with a variety of online directories and follow up to make sure the listings are accurate.
55. A client wants to increase the number of subscribers to his or her electronic newsletter. The VA can contact other list owners of similar subjects to inquire about mutual cross-promotion.

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56. A client wants to promote his or her company online. The VA can submit articles written by the client to electronic newsletters to increase the company's exposure.
57. A client doesn't have time to monitor web site traffic. The VA can monitor banner ad placements, click-throughs, and traffic reports, and make recommendations for adjustments.
58. A client wants to improve web site traffic with related links. The VA can contact similar web sites and request mutual link exchange.
59. A client doesn't have time to monitor his or her web site for errors or broken links. The VA can periodically review the web site and verify links.

Bookkeeping

60. A client needs bill-paying services. The client has all bills mailed to a post office box near a VA (or collects the bills and mails them to the VA twice a month). The VA sets up a checking account with payment authorization for both the client and the VA. As the bills are prepared for payment, the VA notifies the client how much money to deposit into the account. The bills are then paid. Another option, if available from the client's bank, is to use online bill payment services.
61. A client needs bill-paying services plus data entry into accounting software. The client's bills can be mailed to a post office box near a VA, or the client can collect all the bills and mail them to the VA periodically. The VA can do any of the following: (1) set up a checking account with payment authorization for both the client and the VA (as the bills are prepared for payment, the VA notifies the client how much money to deposit into the account); (2) prepare the checks for payment and mail back to the client for signature and mailing; (3) if available from the client's bank, use online bill payment services. As bills are paid, the VA then enters the transactions into accounting software. In addition, the VA can reconcile bank statements, enter credit card transactions, prepare invoices, make and/or enter deposits, and prepare end-of-month reports.
62. A consultant needs invoicing services only. A consultant sends an e-mail to the VA with the number of hours to be billed to a client. The VA prepares and mails the invoice.
63. An association mails annual dues invoices upon membership renewal. The VA prepares the invoices and mails according to schedule. The VA can also receive payments and deposit them into the association's account. All transactions are recorded in accounting software and sent to the association via FTP transfer or mailed on diskette or CD-rom.
64. A client has several account receivables that are past due. The VA can mail past-due notices or follow up via telephone to collect on past-due invoices.
65. A client continues to pay his or her own bills but needs monthly bank reconciliation.

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The client mails a copy of his or her check register along with the bank statement. The VA enters all data into accounting software and reconciles the account. The accounting software is sent back to the client via e-mail attachment.

66. A client continues to pay his or her own bills but needs reminders to pay in a timely manner. The VA can remind the client via e-mail or telephone when due dates arrive.

Purchasing Service

67. On a prespecified basis, the VA faxes to the client a list of office supplies that are used on a regular basis. The client checks off what is needed and faxes the list back to the VA. The VA reorders the supplies and has them delivered directly to the client.
68. A client needs a new printer. After the VA researches the various makes, models, and so on, he or she sends written quotes to the client. Upon client authorization, the VA purchases the printer and arranges for delivery to the client. If the item to be purchased requires on-site setup, the VA makes those arrangements as well, confirming dates, times, and travel information.
69. When available, a VA can set up an online account on behalf of a client with stores that supply the client with supplies. When supplies are needed, the VA places the order with delivery to the client.
70. A VA working with the client's accountant can set up lines of credit with vendors and monitor them to keep the credit information current and accurate.
71. A client needs to order marketing materials (stationery, brochures, envelopes, etc.). The VA can obtain pricing quotes and coordinate ordering, delivery, and payment.
72. A client is preparing an awards ceremony for the annual company meeting and needs awards or employee recognition gifts. A VA can research for appropriate gifts and coordinate their purchase and delivery.

Writing/Editing Service

73. A client is preparing a brochure, flyer, web site or manual and needs assistance with the copy. A VA can write, format, proofread, edit, spell check, and grammar check documents.

Marketing Service

74. A client implements an advertising plan. The VA monitors the plan, submits ads by deadlines, tracks expirations dates, coordinates payment, handles correspondence with advertising vendors, and continually updates the advertising report and/or advertising budget report for the client's review.
75. A client maintains a variety of sales brochures. E-mail requests are forwarded to the

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VA. The VA's fax number is advertised. Postcards are mailed with the VA's address as the return address. The VA is stocked with a supply of each sales brochure and mails the appropriate brochure upon receipt of request. The VA also updates the client's database with name, address, date, and type of brochure requested.

76. A client wants to monitor customer satisfaction. The VA types a customer feedback questionnaire, mails it to customers, receives the completed questionnaire, summarizes the responses, and issues a report to the client.

Personnel Services

77. A client receives employment applications and faxes them to a VA. The VA verifies past employment, calls the references, and reports the findings to the client.

78. A client needs to hire on-site office personnel. A VA can write a help wanted advertisement, place the ad, receive and review the resumes, conduct the initial phone interview, narrow the selection to three individuals, and schedule personal interviews with the client.

79. A client needs reminders for annual performance review dates. The VA can track the dates and send reminders to the client.

80. A client needs assistance with payroll requirements. A VA can monitor and verify that all payroll requirements have been met, appropriate taxes paid, and forms filed.

81. A client hires a new employee. The VA can prepare a welcome package and send it to the new employee.

82. An unemployed individual or individual desiring a career change needs a resume prepared. The VA can prepare or update a resume and include an introduction letter.

83. An individual seeking new employment can give a list of appropriate positions sought to a VA. The VA can research job openings online and submit resumes to online resources.

84. An unemployed individual or individual desiring a career change wants personalized resumes. Every time the individual finds a potential new employer, the individual telephones or faxes the VA with the information. The VA prepares a personalized cover letter and resume and faxes or mails them to the prospective employer.

85. An individual seeking new employment goes on an interview. He or she sends an e-mail or telephones the VA with the interviewer's name and address. The VA promptly mails out a thank-you follow-up letter to the potential employer.

86. An individual seeking employment can use a VA to conduct a practice interview. Virtual assistants specializing in personnel management services can offer many suggestions to ensure a positive, successful interview.

87. A client receives hundreds of resumes for an ad posted. Given some key

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specifications to look for, the VA reviews the resumes, types a short biography on each candidate, and sorts the resumes based upon the criteria given by the client.

Personal Services

88. A client is planning a birthday party, anniversary party, or golf outing. The VA can send invitations, receive RSVPs, coordinate catering, and so on.
89. A client has a hard time remembering birthdays, anniversaries, and the like. The VA can e-mail or telephone the client with these important dates.
90. A client makes appointments and then forgets to keep them. The VA can keep a client's calendar and remind the client of dentist or doctor appointments, classes to teach, classes to take, or project deadlines.
91. A busy client needs an extra set of eyes. The VA can tape favorite TV shows or shows of importance and send the video to the client.
92. A busy client needs information on summer camps for his children. A VA is an extra set of hands to research the various options.
93. A VA can provide a clipping service. A VA can regularly monitor particular newspapers or magazines and clip articles of interest or take a trip to the library and copy specific articles. Either way, a VA can save a client a lot of time.
94. A client is planning a wedding. A VA can assist with the invitation list, mailing the invitations, tracking RSVPs, tracking gifts received, and even send thank-you cards.
95. A client was traveling and broke his tooth. The client called the VA and requested a dentist appointment in his destination city. The VA located a dentist, set up an appointment, and asked for directions.