



10 Building Blocks to Success as a Chief Virtual Officer

You, the virtual assistant, are no longer an employee. You are a business owner. You are the Chief Virtual Officer (CVO) of your business. What does it take to succeed as a Chief Virtual Officer? This report covers 10 building blocks which will help greatly.

#1—Build Relationships to Develop Loyal Clients

The key to word-of-mouth referrals is to build relationships that develop loyal clients. When your clients trust you and know your customer service exceeds their expectations, they will go out of their way to promote you and your services to others.

So how can you build relationships that develop loyal clients? You begin by giving your prospects something of value. Provide a free report and valuable information in a newsletter. Your newsletter should not just be an ongoing pitch of your services. Provide something of value - tips, advice, and resources they can use in their business. This helps build trust in your expertise.

Once a prospect becomes your client, continue providing valuable information. Let your clients know of any specials or events that may interest them. Connect with them on Facebook and comment on what they are doing.

- *What do you do to build relationships and develop loyal clients?*



#2—Take Three Steps to Get Your First Client

The #1 challenge new virtual assistants have is getting that first client. You know that if you could get just one client and wow them with your work that they will in turn recommend you to their friends. But how do you get that first client?

There are a variety of things you could do. Today I'm going to give you three different steps you can take to find that first client.

Step #1: Subcontract for an established virtual assistant. Find an established virtual assistant and build a relationship. Some virtual assistants need additional help from time to time and if you've established a relationship, they may call on when they need extra help. Be aware, though, that the rate as a subcontractor may be significantly less than the rate you would charge a client directly. This is to be expected since as a subcontractor you did not go out and find the client and are not directly managing the project.

Subcontracting is a good way to gain experience and make a little income. I strongly suggest you have some sort of written agreement or contract clearly defining expectations and rate of pay. I know virtual assistants who only do subcontract work and don't want the additional responsibilities that come with managing the client directly.

Step #2: Trade or barter services. Especially in difficult economic times, many solo professionals are willing to trade or barter services. I've know life coaches, business coaches, massage therapists, chiropractors and other service providers that were willing to provide their services in exchange for a virtual assistant's time.

If you could use one of these services, find out if they would be willing to barter. Again, this is a great way to get experience and may result in good word of mouth referrals. If the client is happy with your work, this is a great opportunity to ask for a testimonial to use in your marketing materials.

Step #3: Offer an hour or two at no charge. I know you're wondering right now if I really just told you to give away some of your time without getting paid. Is that



what I meant? Yes! However, I did not say you wouldn't get anything in return. Let me explain.

You are brand new, just set up in business and have no clients, no testimonials, no proof you are good at what you do. So why would anyone want to hire you or retain your services for five or ten hours each month? But if you could get even one client, a glowing testimonial and begin your portfolio, then there's a reason for someone to consider using your services. So how do you get that first client? Offer an hour or two for free.

Of course you still want to have a contract detailing the work you will do in that one or two hours. Be sure that both you and the client have the same clear expectations. Let the client know up front that you'd like them to provide a testimonial – if they are truly pleased with your work.

If you provide excellent service, you will find that the majority of clients who you gave an hour or two of time at no charge will want to continue using your services and will gladly pay your fee. I have never been disappointed with my return on investment when I've done this. I've found it's very rare that a client uses their free hour or two and then never comes back.

Since many small business owners are still reluctant to use a virtual assistant and aren't sure what we can do for them, offering a small amount of our time can break the ice. In my opinion, this is not much different than a business coach who offers a free report with the hope that you'll then pay for the more extensive eBook or even pay for his business coaching.

If you're reluctant to offer free services to someone you don't know, you may find a friend or family member that you can do some work for to gain some experience. Of course, this can have challenges of its own.

- *So what step will you take to get your first client?*

#3—Give More to Get More

Would you like to get more clients? Then consider giving



your prospects something more - for free.

Before a prospect becomes your client, they need to come to know and trust you. One way they can learn more about you is if you give them something of value absolutely free. Sure there will be those who accept your free gift and not use your services. But those that are truly interested will be impressed by the trust you extend in giving them something of value. Those are the ones that will become your clients and word of mouth referrers.

You may choose to give a free report to prospects that sign up for your newsletter. When you sign up for my newsletter, you'll receive a 3-page report detailing *9 specific reasons to hire a VA, 4 Income Generating Tasks to delegate to a VA, Can I Afford a VA? and How do I find the right VA for me?*

If you really want to give something away for free, offer a free report on your website and do not require an email. I offer a list of 30 Projects a Virtual Assistant Can Do in One Hour.

- *What can you give away?*

#4—What's Your Specialty?

Virtual assistants often provide administrative support to small business owners. This can cover a large range of tasks from monitoring email accounts and creating documents to making phone calls and mass mailings and a hundred other things.

However, by focusing on specialized work you can reach a specific target market. This allows your marketing to be much more focused. What are some industries a virtual assistant can specialize in?

1. Real Estate – many real estate agents need work done in areas specific to the real estate industry.
2. Accounting – more solo professionals now use Quick Books online and a virtual assistant may choose to focus solely on bookkeeping tasks.
3. Attorney – attorneys need specialized tasks



and if you have the skills needed, this could be a very good market to target.

In addition to specific industries, virtual assistants may specialize in specific types of assistance, such as:

1. Social Media Marketing – using Twitter, Facebook, LinkedIn and other social media tools.
2. Article Writing – editing articles for search engine optimization and then posting on various article submission sites.
3. Blogs – creating and maintaining the solo professional's blog.
4. Websites – updating the client's website as needed.

These are just a few of the areas a virtual assistant can specialize in.

- *What is your specialty?*

#5—Take 5...Minutes to Connect With Your Target Market

It's easy to feel overwhelmed with all the various ways to market on the Internet. Because we are so busy, we may feel there's not enough time to make real meaningful connections with our target market using social media.

Why not just Take 5? Take five minutes a day and do one of the following five things to connect with your target market.

1. Direct message (DM) a contact on Twitter. Perhaps you noticed they just posted a new blog entry you enjoyed reading. Let them know with a DM.
2. Send a message to a connection on Facebook. Did one of your clients just announce a new service or product? Send them a message and congratulate them!
3. Comment on a blog post. You should be following blogs relevant to your industry. Take 5 minutes to make a meaningful comment on a blog entry and add value to the conversation.



4. Write a short blog post. Take 5 minutes to write a short blog post with the top 5 tips on how to... Not every entry you post needs to be a novella.
5. Send an email. Have you recently met someone at a networking event that you would like to follow up with? Send a brief email asking when would be a good time to chat for 10-15 minutes by phone to learn more about their business.

You know you should market your business every single day. On those days when you just feel too busy and overwhelmed to do that, keep this list handy and remember, Take 5...

- *What can you do in 5 minutes to connect with your target market?*

#6—Why Some Business Owners are Reluctant to Hire You

Some business owners are reluctant to hire a virtual assistant because their last virtual assistant . . .

- billed them for time beyond the contracted amount
- didn't communicate regularly with status updates
- didn't ask enough questions
- failed to meet their expectations.

A Chief Virtual Officer:

- *Never surprises* clients with a bill for work done beyond what the contract states.
- *Keeps them updated* on the status of their project(s) in a timely manner.
- Lets them know as you're nearing completion of the time they've contracted so they're *not surprised* when they need additional work only to find out they've used up all the time they retained.
- Asks questions to *clarify* the clients' expectations.
- *Puts in writing* costs, timeframes, expectations and other necessary details so there are no surprises!

Several of my clients were at first reluctant to contact me because they had unpleasant



experiences with other virtual assistants. One client was upset because her last virtual assistant had charged for hours beyond what they agreed on, without the client's authorization and without informing the client before proceeding with the work that additional charges would be incurred.

This client also felt that her previous virtual assistant did not have clear expectations and was disappointed with the resulting work. Asking lots of questions and clearly communicating expectations would have alleviated this challenge.

Another client wanted their virtual assistant to do more than just complete assigned tasks. The client wanted a virtual assistant that could guide and advise them on what was best for their business. I was able to help this client accomplish the task – after advising him of a different tool that would grow with his business rather than the tool he was currently using and would shortly outgrow.

Though reluctant at first to hire another virtual assistant, these clients did choose to do business with me based on the recommendations of other happy clients. They in turn are now happy clients and recommend my services to their associates without hesitation.

#7—Put It In Writing

Now that you have set up shop as a virtual assistant, you need to put it in writing. There are several documents you need to write if you want to have a successful VA practice. Here are some:

- Business Plan
- Marketing Plan and Calendar
- Vision and Mission Statements
- Contract for Subcontractors, if you use them
- Client Contract detailing policies and procedures

You and your clients should have a clear understanding of what is expected from each party and what deadlines are required. Put it in writing and include your availability by phone and email.



Chief Virtual Officer advisors Joel D Canfield and Jerry Kennedy would like to offer some advice as well. First, Jerry's comments on that often misunderstood topic, selling:

#8— 'Motivation' Begins and Ends With 'Motion' by Jerry Kennedy

OK. So I stole this title from my friend, Joel D Canfield. He's a pretty forgiving guy, though, so I'm sure he'll let it slide. Especially when I flatter him by saying that is, quite literally, one of the most brilliant phrases I've ever read.

Take today, for example. As you may or may not have already read, today started off pretty badly for me. I was having one of "those" days, and I wanted nothing more than to just call it quits and spend the day wallowing in my funk. I decided, instead, to take some of my own advice by getting out of the office and seeing some prospective clients. When I got back, I had a conversation with Joel in which I mentioned to him that the minute I talked to my first prospect and she said "No," I immediately felt 100% better.

Joel was a little confused by this, so I explained that the rejection was validation that I was in "action" mode. And that, so long as I was in motion, I was building momentum. That's when he uttered the phrase that became the title of this blog post. And I agree with him wholeheartedly.

You see, even though I didn't sell anything today, I got engaged in the process. As I've said before, you don't make an orange by magic or positive intent or even by trying to force it to happen; you make an orange by planting a seed, by starting and then supporting the process that will eventual lead to an orange. The same is true in your business: you never, and I mean never ever get results by wishing for them or trying to force them. You only get results by taking the first step, planting the seed, then supporting the process that will lead to the outcome you're looking for.

I learned a valuable lesson today. Actually, it was more of a reminder than a lesson, since I talk about this all the time. I was reminded that



the best way to solve a feeling of negativity is to change your state, to consciously choose a different reaction...to do something, no matter how small or insignificant that something might be. Go out and risk a little rejection. Trust me; it feels a whole lot better than doing nothing.

#9—Are You Afraid to Sell?

by Jerry Kennedy

Here's a scary statistic for you: according to the US Small Business Administration, about a third of new small businesses fail within their first two years, and a total of 56% fail within their first five years. Any gambler will tell you: those odds suck.

And why do so many new businesses fail? Studies say that this high rate of failure is primarily because businesses have a difficult time making a profit in their first year and run out of capital. I disagree. I say it's because most business owners are afraid to sell.

Have a look around you at any business mixer geared toward small business owners and entrepreneurs and what do you see? A room full of intelligent, industrious, charming people interacting and exchanging contact information via the business card swap. They're here to "make contacts" and "expand their network", and they are, for the most part, pretty good at working the room and meeting new people.

Fast forward to the following morning, and what do you see? Those same intelligent, industrious, charming business people, sorting through all those business cards and putting the information into their databases and CRM programs, flagging them for follow up, then moving on to other "more important" tasks.

A couple of days go by and the CRM program pops up an alert to follow up on those contacts, but they hit the snooze button because something "more important" has their attention at the moment. A few more days go by; the alert pops up again, and is again ignored in favor of "more important" work. Then a few weeks have passed and they say to themselves "Well, I'll feel pretty silly calling them now, after so much time has passed...maybe I'll just look for them at the next mixer



and re-connect. I've got more important things to do right now, anyways."

In the sales profession, we call this kind of behavior "call avoidance", and it's caused by fear: fear of rejection, fear of looking stupid, fear of not knowing what to say, fear of what other people will think of them, fear of all kinds of silly and irrational things. The obvious cure for this disease, of course, is to pick up the phone and start selling.

"Now wait just a minute," they cry, with a look of panic in their eyes. "I didn't get into business so I could become a (hissed through clenched teeth) salesperson!"

Well then, my friend, you didn't really get into business. After all, if you're not selling something, isn't it just a hobby? Here's a reality check for you: selling is the most important part of every business, because without sales your business joins the 56% mentioned in the first paragraph of this post.

And now, a final word from Joel:

#10—There's No Such Thing as Work/Life Balance (or, Another Reason Business is Not About Money)

by Joel D Canfield

Two themes come up frequently in my conversations with and reading about other entrepreneurs—work/life balance, and 'the bottom line.'

The first doesn't exist, and the second is not why you're in business.

If you're in business for the right reasons, you love what you do; it's what gets you out of bed in the morning. Of course you love your family; of course you have other interests besides work. No respectable person puts work ahead of family; no reasonable person only has one interest, to the exclusion of all others.

But you'd better love what you're doing, especially if you're self-employed. Honestly, why would you hire yourself to do a job you don't like?



So, let's assume that your work is just another manifestation of your passion.

Do you really expect to take it off and put it on like a sweater? And what does it have to do with money?

Sometimes I work late into the night, missing some family time because I'm in the zone. Sometimes. But, just as often, more often, actually, I take time in the middle of a 'business day' to spend time with my wife, my daughters, my friends. I take time, right in the middle of the week, away from work and the office, to share in spiritual activities with my family. I stop work at 4:00 most days to work on an album of jazz songs I'm writing with my older daughter; then, I go back to what I was doing. Or, I don't. I keep my goals loose and flexible where possible, so I can decide how to spend my time.

Work/life balance means being balanced in my own head, not balanced on a clock or calendar.

And money? C'mon; I'd do 90% of what I'm doing right now, even if I had enough money to retire. I love writing. I love coaching solo professionals, writers, musicians, helping them communicate with their prospects and fans better to establish trust and build relationships. I love my web business; sorting out what's needed, designing tools, doing usability studies, helping clients build what they really need instead of what they think they need. (Okay, if I really had money, I'd offload the coding to someone more talented than me.)

I love to barter. If someone has a skill I can benefit from, and they need something I can do, I want to work with them. What I don't want is to turn our genuine human caring into a commercial enterprise. Fer cryin' out loud; the whole point of my consulting business and my writing is to do exactly the opposite, to get businesses to be more human, to stop behaving like abstract entities with no soul, and start speaking and trusting and caring like real human beings do.

Work/life balance is how you choose to serve yourself and the ones you love, every minute of every day; choices



about the long run, not the moment.

And, in the long run, it's not about money. Not ever.

Your Next Step to Success

I hope you found valuable information in this report that you can use in your virtual business immediately. These are just a few of the building blocks to success as a Chief Virtual Officer.

Your next step to success is to invest in the success of your business. Start with your free 30 minute consultation with two experts who, literally, wrote the book on how to run a successful business as a virtual assistant—the owners of Chief Virtual Officer, Sue L and Joel D Canfield. Once we've helped you resolve your greatest business challenge in just 30 minutes, you can choose a coaching program to fit your specific needs.

Sue L Canfield, CVO

Free 30 Minute Consultation!

Contact us to schedule your free consultation because we can help you resolve your greatest business challenge in just 30 minutes.

**Free Means
No Obligation, No Pitch, No Kidding
Call us toll-free at (877) 324-9226
or email Contact@ChiefVirtualOfficer.com**

