

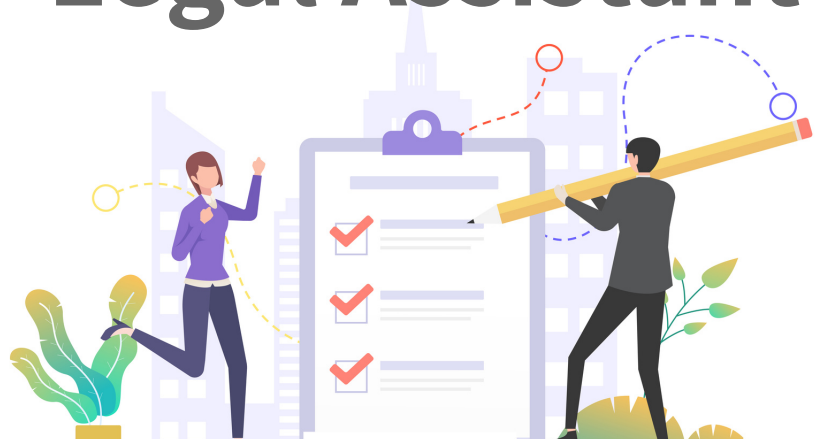
3

CRITICAL

Steps
TO
ensure

SUCCESS

**With Your Virtual
Legal Assistant**



Follow these 3 steps to ensure success with your virtual assistant:

What

Know what you're going to delegate.

- Track your daily tasks for 1 week.
- Decide which are tasks only you can do.
- Anything left can be delegated - start with repetitive tasks & clear goals.

How

Know how you're going to start delegating.

- Capture processes with a video (we love Loom!)
- Create SOP's.
- Live training.

Who.

Decide who will best support you.

- Identify any skills needed for the tasks.
- Identify software skills.
- Identify the personality-type to best support you.



Kudos on taking the first step to work with your very own virtual legal assistant! And more importantly...what you need to do **BEFORE** you even get started to ensure a successful relationship!

We get it...you're already at max capacity which is why you're looking for help in the first place, and now you have to fit onboarding & training into your jam-packed schedule.

But if there's one thing we've learned over the last 20+ years it's that the more time you put in the beginning stages of onboarding with realistic expectations, the easier and faster you'll get up to speed with your VA.

So, let's get you started with the 3 critical steps to ensure success with your virtual assistant!



Step

1

Know **WHAT** you're going to delegate.

- Track your daily tasks for 1 week (sample tracker below).
- Looking at your tracker, circle or mark the tasks *only* you can do.
- Anything left can be delegated! We suggest starting with repetitive tasks and setting clear goals at each 30/60/90 mark.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
5:30 AM							
6:00 AM							
6:30 AM							
7:00 AM							
7:30 AM							
8:00 AM							
8:30 AM							
9:00 AM							
9:30 AM							
10:00 AM							
10:30 AM							
11:00 AM							
11:30 AM							
12:00 PM							
12:30 PM							
1:00 PM							
1:30 PM							
2:00 PM							



Step

2

Decide **WHO** will best support you.

- Identify what skills are needed for the tasks.
- Identify what, if any, software knowledge or experience is needed.
- Identify the personality-type that best supports you.

SKILLS NEEDED

**SOFTWARE
EXPERIENCE**

**PERSONALITY
TYPE**



Step 3

Know **HOW** you're going to onboard your Virtual Legal Assistant.

- Capture processes with a video (we love Loom!), SOP's, live training, or a mix of both.
- Establish an onboarding process to ensure success, sharing your mission, vision & value statements.
- Co-create realistic expectations & goals with your VA to measure success.

PROCESSES TO CAPTURE

ONBOARDING IDEAS

STEPS TO MEASURE SUCCESS



Congratulations!

IF YOU FOLLOW THESE THREE STEPS,
YOU'LL BE ON THE *RIGHT* PATH TO
ENSURING SUCCESS WITH YOUR
VIRTUAL LEGAL ASSISTANT!

And... if it still seems overwhelming, schedule your free Discovery Call by clicking the button below today and our experienced team will talk through any questions or concerns you have that are still lingering.

[Schedule a 30-Minute
Discovery Call Today!](#)