



QUALITY TRADES BOOKKEEPING AND VAs

What Could Your VA Do for You?

High Level Tasks

- Estimating &/or Quoting
- Project Management
- Coordinating your team - scheduling jobs and crew; rosters
- Administering the safety system
 - Making sure your team have updated their SWMS
- Managing your Job Management System
 - Making sure your team has entered times for timesheets
 - Making sure data is correctly entered, coded and assigned to the right jobs
- Documenting systems/recording policies and procedures
- Attend virtual training events from associations
- Handle customer complaints

Sales Process Tasks

- Quote and appointment setting
- Sending reminders to customers about their appointment
- Typing up proposals
- Holding you accountable for making your calls
- Giving you reminders of the appointments in your calendar so you're there on time
- Finding the best sales virtual tools to improve your sales process
- They can be the 1st contact for potential and existing clients, and continue to be that contact for the entire sales process. Consistency of contact builds trust.
- Following up quotes and customer enquiries

Marketing Tasks

- Collating Marketing statistics/marketing reporting
- Social media management
 - Creating and publishing posts
 - Responding to interactions
 - Creating connections and building followers
 - Update with images of jobs completed
- Creating and maintaining your CRM (customer relationship management) system
- Provide research and information to help in finding new leads
- Research how marketing tasks can be automated
- Conduct customer research e.g. satisfaction surveys



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Managing Money Tasks

- Chasing overdue payments
- Reconciling jobs (profitability analysis)
- Researching best prices for materials
- Sending invoices to clients
- Basic bookkeeping

General Admin Tasks

- Email Management - filtering/managing spam
- Answering the phone
- Entering data into job management system
- Keeping HR records (holidays etc)
- Managing your calendar
- Online research of industry best practices
- Ordering materials, checking prices for different suppliers
- Create a customer database
- Answering Customer Service emails
- Reminders to customers before the job starts
- Google Drive Set up & organisation
- Travel arrangement & planning
- Data entry
- Creating document templates and spreadsheets
- Personal errands they can complete online - e.g. gifts
- Supplier material / deliverables tracking
- Editing / Proofreading Emails
- Updating supplier lists and contact details
- Follow suppliers and competitors on social media
- Organise staff events
- Obtain and promote customer testimonials

Small Fish Business Coaching Tasks

- Updating the Relationship marketing Tracker
- Holding you accountable for your Quote Tracker work - a meeting with them weekly to go through it
- Updating your Big Numbers Tracker
- Reminding you of your coaching meetings
- Reminding you what you need to prepare for your coaching meetings
- Attending your coaching meetings with you so they know what to hold you accountable for