prialto

How to Effectively Leverage a Virtual Sales Assistant

A report from InsideSales.com found that salespeople only spend 36% of their time actually selling. The remaining is spent on non-revenue-generating tasks including:

- Admin tasks
- Prospect research
- CRM management (including data entry and cleaning)
- Scheduling meetings

Though often critical, these tasks are a huge drain on your time and productivity. A virtual assistant can help you close more deals by taking these tasks off your plate and enabling you to spend the majority of your time engaging with leads.

This guide will walk you through how to leverage a VA by explaining use cases, answering common questions, and sharing what you can expect when you sign up for our services.

Tasks You Can Offload to Your Assistant

Your assistant is capable of tackling a wide variety of tasks to meet your needs. To give you a better idea of what that looks like, here are some of the common ways we support our members who work in sales and business development:

Need help with a task that's not listed here? No worries. We can support you with any objective, repeatable process and are happy to hop a quick call with you to explore how we can meet your specific needs.

Additionally, here are some popular use cases of how our virtual assistants give salespeople more leverage:

Keeping Their Pipeline Full of Prospects

Hubspot research found that over 40% of salespeople think that prospecting is the hardest part of their jobs. Finding prospects is a tedious, time-consuming process that pulls you away from engaging in sales conversations. With a virtual sales assistant, you'll never have to do prospect research again.

All you have to do is give them criteria about the types of prospects you're looking for. Most of our clients give their VAs the following characteristics:
- Industry
- Job title
- Geographic region
- Company size
- Private, public or non-profit

Using those guidelines, your virtual sales assistant will add a fixed number of prospects to your CRM each week and, if you'd like, send an initial outreach email.

Leveraging Insights from Their CRM

Your CRM is your most effective tool for tracking and gaining insights about your pipeline. However, inputting all your data is time-consuming and many salespeople aren't able to run accurate pipeline reports since their data is outdated.

A virtual sales assistant can help you leverage your CRM by:
- Inputting all of your contacts into your CRM and filling in additional information about them.
- Logging every call, email, and meeting so you have a record of all of your interactions with leads.
- Keeping your data clean and up-to-date by changing statuses as needed, removing duplicate data, filling in missing information, etc.
- Running reports and sending them to you so you have access to the latest insights about your pipeline.

All you have to do is give your assistant access to your pipeline information and they'll manage your CRM.

Maximizing the ROI of Business Trips

The best way to maximize the ROI of your business trips is to fit in as many meetings as possible. Your VA will prevent you from wasting time going back and forth across cities by reaching out to all of your contacts in the city you're visiting and scheduling meetings in the same neighborhoods close together.

For example, if you're visiting New York City for a couple of days, they'll reserve one morning on your calendar for meetings in Soho, an afternoon for meetings in Midtown, another morning for meetings in the Upper Eastside.

All you have to do is give your VA your travel itinerary and they'll fill in the gaps with meeting opportunities close by.

How to Develop a Productive Relationship with Your Virtual Assistant

Like with any other colleague, you need to develop a productive working relationship with your VA. Here are some best practices that will ensure you get maximum leverage from your assistant.

Communicate with context.

It is essential that you communicate your preferences. Provide context and direction with your requests and we will document your preferences in your Prialto Member Manual (PMM) so we know for the future. For example, tell us about your places to host meetings, times you prefer to communicate with us, travel preferences, etc.

Leverage your Engagement Manager.

Whether you want to offload a new project or are experiencing challenges with your VA, let your Engagement Manager know. Their role is to manage your service so you don't have to. So, don't wait to delegate new processes or let frustrations go by because you don't want to spend time handling the issue. Instead, loop in your Engagement Manager, sit back and watch things improve.

Embrace clarifying questions.

Your VA is trained to ask clarifying questions to ensure they meet your expectations. He/she then document your answers in your member manual so they know how to complete tasks moving forward. For example, If you ask your assistant to schedule a meeting but don't say whether it will be in-person or a call, your VA will ask you clarifying questions. If you always meet with this contact in-person, tell us and we will note it in your manual.

Think about your business processes and preferences.

What are your typical scheduling patterns? What are the pain points in your current process you would like us to help iron out? If you have a big picture idea or process you would like to offload but aren't sure how, let your Engagement Manager know and they will be your thought partner in establishing a process.

The core of these best practices is simply communicating clearly with your assistant and Engagement Manager. If you do that, you'll get a huge return on your investment.

How Your VA Can Use Your Tools

Here are some common Q & A's people have about getting their assistant set up with their systems.

Q: Do you support [insert tool]?

A: Your assistant can use any online tool that you use. We support members in numerous roles and industries so, chances are, one of our employees has experience with your systems and will be able to train your VA how to use it.

If you use a tool that we don't have experience with, we'll just ask you to quickly share your screen to walk us through how you use it. Then, we'll do some additional research about the tool and train your assistant to use it.

Q: How do I give my assistant access to my tools?

A: You will give the login info for all of the tools your assistant is working with to your Engagement Manager. They will add your logins to the password sharing tool, Bitium and use that to securely give your primary and back up assistants access.

Q: Can you help me adopt [insert tool]?

A: Absolutely. Many of our members want to use additional tools such as CRMs and expense reporting software but they just don't have the time to figure out how to use them. If that sounds like you, your Engagement Manager can help you get set up and train your assistant to put in the heavy lifting of using your new tools.

Have Questions? Here are Some Answers

Here are answers to some of the most common questions we receive from prospective clients.

Q: What hours do VAs work?

A: Your virtual assistant will work 8 AM to 5 PM in your time zone. We currently support all US and UK time zones. You can choose to receive support in whichever one is most convenient for your work hours.

Q: How much work can I offload to my VA?

A: You can offload approximately two and a half hours of work to your virtual assistant per day. However, this amount is not fixed. If you have a busy week, you can exceed that daily amount as long as you average fifty-five to sixty hours per month.

A: Can my VA also support my colleagues?

A: Yes! A single unit (⅓ of a VA's time) can support up to three members as long as their total combined usage averages around fifty-five hours per month. If your colleagues need additional support, you can purchase more units. We will assign the additional units to your virtual assistant or a member of their cohort so your colleagues get someone who is already familiar with your business.

Q: Can my VA answer phone calls from prospects?

A: Yes, when you onboard, we give your virtual assistant a phone number in your area code. You can give that number out to prospects and others to screen your calls. If your VA is unavailable to take the call, your back up assistant will. Your assistant can take messages and provide basic information but cannot engage in selling.

Q: Will my VA be trained on sales support processes?

A: Yes! We train all of our assistants on the following processes:
- Using Salesforce and general CRM best practices
- Scheduling/calendar management
- Prospect research
- Filing expenses
- Managing outreach campaigns
- Completing miscellaneous admin tasks

If you need to train your VA on custom processes, all you have to do is share your screen and walk through how you do the process. Your Engagement Manager will record the meeting and use it to train your VA.

Q: Can my VA also help with the middle and bottom of funnel tasks?

A: Yes! Your virtual assistant can support you with any process-driven task. Many of the salespeople we work with leverage their VA for scheduling, CRM management, and client on-boarding when leads reach the middle and bottom of funnel stages.

Interested in Learning More? Here's How to Get Started

1) Call us at 1-888-873-6101 or email us at sales@prialto.com to set up a discovery call. In the call, one of our sales executives will gather more information about your needs and help you explore whether Prialto is a good fit for you.

2) Take our Needs Analysis Survey. The survey will help you and our sales team clarify what your needs are. Our sales team will combine the results with the information gathered in your discovery call to create your implementation plan.

3) Schedule your implementation plan review call. In this call, your sales executive will walk you through exactly how we'll help you achieve your goals if you sign up with us. This call is also a great opportunity to clear up any other questions you have.

4) Get ready to on-board. Once you're satisfied with your implementation plan, we'll send over an agreement and start preparing for your on-boarding.