HOW TO GAIN LEVERAGE WITH PRIALTO VIRTUAL ASSISTANTS

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WHAT YOU'LL LEARN

Choosing the right virtual assistant solution plays a huge role in your business's success, productivity, and work-life balance. We get that so, we've created this guide to help you gain a better understanding of how our managed service approach can give you greater leverage and maximize your efficiency.

We'll dive into the following topics:

- How you can leverage an assistant
- Getting virtual assistants set up with your tools
- How we train your assistant to excel at your projects
- Best practices for working with your VA
- How we ensure your information remains secure
- Our process for minimizing the impact of time off and turnover
- Scaling support to meet your changing needs

If you have questions about anything in this guide, feel free to reach out to us at sales@prialto.com.

HOW YOU CAN LEVERAGE AN ASSISTANT

Since our experience spans several industries, our assistants are capable of tackling a wide variety of tasks to meet your needs.

When working with enterprises, we handle processes in three core areas:

Business Admin	Sales Support	Operational Support

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Our service is fully customizable to meet your business's needs. However, our assistants are pre-trained on the following tasks and processes.

Business Admin

All of our virtual assistant are trained on standard administrative tasks including:

- Calendar management
- Travel management
- Expense Reporting
- Call screening
- Professional networking support

Sales Support

Our VAs empower you to spend more time with prospects by offloading tedious tasks, including:

- CRM management
- Campaign management
- Prospect research and list building
- Note taking
- Email management
- Lead and prospect management

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Operational Support

We enable you to work more efficiently by ensuring all of your data is standardized and up-to-date and helping with other tedious, processes-driven tasks such as:

- Data entry
- Work-flow support
- Data verification and cleaning
- Documentation preparation
- On-boarding and off-boarding support

This is just a snapshot of the work our virtual assistants can do for you. You'll work with an account executive to create a customized solution and an implementation plan that guides the first two months of service. After that, your Engagement Manager will help your team offload additional projects as your business needs evolve.

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GETTING VIRTUAL ASSISTANTS SET UP WITH YOUR TOOLS

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

Do you support [insert tool]?

Your assistant can use any online tool that you use. You can check out our tools database for a list of the tools we use most frequently.

See Our Tools Database

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.

Can you help me adopt [insert tool]?

Yes, our Engagement Managers regularly set up CRMs, task management software, and other tools. We also teach your virtual assistants how to use those tools.

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How do I give my assistant access to my tools?

You will give your login info to your Engagement Manager.They will add your logins to the password sharing tool, LastPass Enterprise and use that to securely give your primary and back up assistants access.

How do I ensure the VAs won't cause any issues within our systems?

Since all of our assistants can only access your systems while they're working on Prialto-owned computers, we have significant oversight and security measures in place.

HOW WE TRAIN YOUR ASSISTANT TO EXCEL AT YOUR PROCESSES

Getting your assistants up-to-speed on your processes is quick and easy. We pre-train our assistants on a variety of processes.

Many of our accounts find that the training we provide encompasses most of what they want their assistants to know. As a result, you may only have to train your assistants in two areas:

Your company policies as they pertain to the work your assistants are doing.

For example: If VAs are helping you with expense reports, share your company policies regarding deadlines and how to file them.

People's individual preferences for the tasks they offload.

For example: You may prefer to have most of your meetings in the afternoons, have documents formatting a specific way, and have other preferences that are unique to you.

If you're offloading custom processes to your assistant, you'll need to train your assistant on how to do those tasks. To do so, you (or someone on your team) just need to schedule a training call with your assistant and Engagement Manager. We'll record the call, document the process, and ensure your assistant understands how to complete it.

MINIMIZING THE IMPACT OF PTO & TURNOVER

If you've had an assistant before, you know how difficult it is to suddenly go without support while your assistant is out of the office or, even worse, when they quit. These kinds of disruptions can have a substantial negative impact on your your productivity and efficiency. So, we actively prevent time-off and turnover from interrupting the service our accounts receive. Here's how:

1. **We train back-up assistants.**
   When your primary assistant is out of the office, a back-up who fully understands all your tools and processes will take over, so you never go a business day without support. The back-up assistants have access to a detailed member manual that documents all of your tasks and preferences so that you receive the same speed and quality of support.

2. **We invest in employee retention.**
   Unlike in-house assistants who change jobs on average every eight months, most of our assistants stay with us for many years. We offer performance-based bonuses, recognition programs, employee-driven wellness activities, and professional and skill development opportunities.

Even if your assistant does decide to move on, we'll have a replacement trained and ready before they leave to ensure you have a smooth transition.

BEST PRACTICES FOR WORKING WITH A VIRTUAL ASSISTANT

Your Engagement Manager will work with you to help you develop a productive relationship with your virtual assistant.

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 to us. 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.

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Embrace clarifying questions.

Your VA is trained to ask clarifying questions to learn your preferences. He/she documents your answers in your member manual. If you're repeating yourself, reach out to your Engagement Manager, and they will improve your service.

Leverage your Engagement Manager.

Your Engagement Managers resolves service issues, so you don't have to. Don't let little mistakes or frustrations go because you don't want to handle the problem. Instead, loop in your EM, sit back, and watch things improve.

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, you would like to offload but aren't sure how, tell your Engagement Manager, and they will be your thought partner in establishing a process.

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

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SCALING SUPPORT TO MEET YOUR CHANGING NEEDS

Our service is designed to quickly adapt to your changing needs. Here are answers to a few of the common questions we get about scaling support:

How long does it take to add additional units?

We can usually on-board new members of your team within three to five business days as long as you complete their IT set-up within that time frame.

Can I drop units that I no longer need?

Yes, you can reduce the number of units you have. The amount of time that it takes to terminate a unit is based on the notice length stated in your agreement.

Can I transition units to different people on my team?

Yes, you can transition units. If you're transitioning units to someone who has similar needs, we'll host a quick transition call to introduce them to their VA and gather their preferences. This can be completed within a week. If you're transitioning the unit to someone who plans to offload projects that we're not currently doing for a member of your team, you'll also have a couple of training calls to review them. This may take a couple of weeks, depending on how complicated your projects are.

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INTERESTED IN LEARNING MORE?

Your first step to getting started is a discovery call with one of our account executives. During your call, we will discuss your team's needs and how Prialto can help. This conversation is to determine a potential fit with your business and broadly how the service could be rolled out.

GET IN TOUCH

Feel free to contact us if you have any questions or want to learn more about leveraging VA support.

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