VIRTUAL ELVES

Real people. Remarkable results.

Client C.A.R.E. Daily Guide

Empowering Virtual Elves VAs to Go Above and Beyond in Providing Exceptional Client Experiences

Content

Welcome Message

Welcome to the Client CARE Program, a strategic initiative by Virtual Elves to standardise and elevate the quality of service you provide to our clients.

This handbook summarises key lessons from the **Client CARE Program** and will serve as your reference and guide as you implement what you've learned in your day-to-day client interactions.

This handbook is more than just a resource—it is your **DAILY guide** for excellence and will be an important part of your KPI.

Keep this handy, as this will be your constant guide to keep a successful partnership with your clients.

> ***Client CARE isn't just about solving problems—it's about creating confidence, building trust, and delivering value before it's even asked for.***
>
> ***— Virtual Elves***

Program Purpose

The Client CARE Program is designed as a standard process to empower every Virtual Elves Virtual Assistant (VEVA) with the mindset, tools, and communication strategies necessary to provide exceptional service consistently.

This program is not just about getting tasks done—it's about becoming a reliable, proactive, and trusted partner to our clients.

By applying the standard Client CARE framework daily, every VEVA will be equipped to:

✅ **C - onnect with Clarity**

Set the tone for a productive working relationship by confidently clarifying deliverables, deadlines, and task boundaries to avoid misunderstandings.

✅ **A - nticipate Needs**

Anticipate client needs, spot red flags early, and take initiative to suggest improvements that align with the client's goals and business direction.

✅ **R - espond Proactively**

Use thoughtful, intentional communication to build trust, set expectations, resolve issues respectfully, and maintain professionalism at all times.

✅ **E - levate the Experience**

Go beyond task completion by creating value in every interaction—fostering loyalty, satisfaction, and long-term partnership through care, consistency, and excellence.

When VAs apply the CARE approach daily, they don't just support their clients—they strengthen the entire Virtual Elves brand.

Program Purpose

Here are the impacts, IF we do not follow the Client CARE Framework

Impacts on the Client Relationship

1. **Decreased Trust**
   - Clients may begin to question the VA's reliability or commitment, especially if hours are consistently missed without proper communication.

2. **Unmet Expectations**
   - Tasks and projects may be delayed or left incomplete, leading to dissatisfaction and potential loss of the client.

3. **Perceived Lack of Value**
   - If clients are paying for a specific number of hours, underutilization may make them feel they're not getting their money's worth.

4. **Risk of Churn Rate**
   - Clients may choose to terminate the contract and look for a more dependable VA or service provider.

Program Purpose

Impacts on the VA

1. **Performance Issues**

Not meeting the required KPIs could lead to performance warnings or being flagged for underperformance.

2. **Reduced Income**

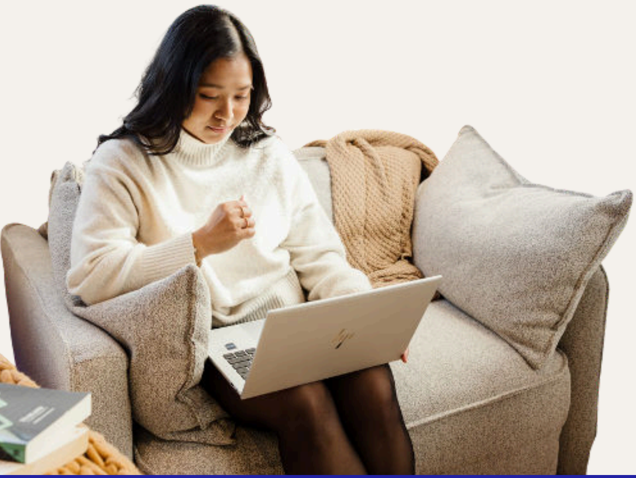
If VAs are paid hourly, falling short of targets means a lower paycheck.

3. **Client Reassignment or Loss**

The VA might be removed from the account and reassigned, or lose the client altogether.

4. **Damage to Professional Reputation**

Internally within the company, the VA may be viewed as unreliable or disengaged, which affects future opportunities or endorsements.



Program Purpose

Operational and Business Impacts

1. **Billing and Revenue Shortfall**

For the company, not hitting hourly targets reduces billable hours and affects projected revenue.

2. **Administrative Burden**

Extra effort may be required from operations to monitor, follow up, and reassign tasks or accounts.

3. **Client Confidence in the Business**

If it happens regularly, it can affect the client's overall confidence in the agency's ability to manage virtual staff.

Why the CARE Program Matters

Virtual Assistants are not just doers—they are strategic partners. This program ensures:

- Reduction of misunderstandings and conflict
- Anticipated client needs instead of waiting to be told what to do
- Maintained trust through consistent, clear communication
- Increased client satisfaction and retention
- The Client CARE Program is now part of your KPI. All VAs are expected to consistently apply this framework.

Standard Client C.A.R.E. Framework

This will serve as a standard procedure to equip every Virtual Elves Virtual Assistant (VEVAs) with the mindset, tools, and communication strategies essential for delivering consistently exceptional service.

C - ONNECT WITH CLARITY

(Expectation Management)

Objective:

Ensures a clear understanding of tasks, timelines, and deliverables.

A - NTICIPATE NEEDS

(Proactive Thinking)

Objective:

Spots potential issues or opportunities before they arise.

R - ESPOND PROACTIVELY

(Effective Communication)

Objective:

Responds to messages, feedback, and issues with intention and care.

E - LEVATE THE EXPERIENCE

(Client Satisfaction)

Objective:

Goes above and beyond to deliver excellence.

Connect with Clarity

Ensures a clear understanding of tasks, timelines, and deliverables.

Connect with Clarity

Effective **expectation management** is key to successful collaboration between virtual assistants and clients. It starts with asking the right questions to fully understand the client's needs and goals.

From there, it's important to clarify deliverables by outlining exactly what is expected, what success looks like, and what outcomes are to be achieved.

Ensure to confirm mutual understanding through recap messages or written agreements to avoid any miscommunication. Setting clear timelines, boundaries, and task priorities helps both parties stay aligned, manage workloads efficiently, and build trust through consistent, reliable performance.

Expectation Management

Ask the right questions
Clarify deliverables
Confirm mutual understanding
Set timelines, boundaries, and task priorities

CARE in Action: Daily Guide

Time of Day	What to Do?
Start of Shift	• Check In with clients, by simply messaging them to create rapport • If no answer is received within an hour, simply call your client via WhatsApp to let him/her know that you are around and ready to support them. • Clock in via WhatsApp when you are to start your day with the client and run your Hubstaff. Don't forget to clock in your Group channel via Google chat too. as this is to monitor our daily attendance. • Review client instructions; clarify anything unclear
Mid-Shift	Update client via WhatsApp or email on progress. If you are working with your client on a flexi schedule, ensure to message your client before 3pm PH time to allow your clients to reply to you due to time zone difference.
End of Shift	• Send the EOD link as an update, and ask questions as needed. • Clock out via WhatsApp so your client is aware, Google Chat and stop your tracker.
Weekly Planning (Fridays)	Suggest weekly plans for the next week
Weekly Huddle (Mondays)	Suggest a weekly call with the client to help set expectations

Tools

Tools	When to use it
WhatsApp	• Client communications (when starting to work and clocking out) and other important messages. • Acknowledge your clients message in a timely manner
Email	Check your VE email address and your assigned client email addresses daily and/or hourly
Grammarly	Use this tool to help you write better. Set it up in Australian English
Loom	To record short videos to clarify questions

Scripts

Questions you can ask your client when you are:

✅ Getting to Know Them Better

"What inspired you to start your business?"

"What are your main goals for this year?"

"How do you prefer to communicate—email, chat, or video calls?"

"What does a successful partnership with a VA look like for you?"

✅ Understanding their Work Preferences

"Do you have any processes or templates you'd like me to follow?"

"How often would you like updates from me?"

"What are your top priorities this week/month?"

"Is there a specific way you'd like tasks reported or tracked?"

Scripts

✅ Building Trust and Collaboration

“How can I make your day or work easier?”
“Is there anything I can take off your plate right now?”
“Are there tools or platforms you’d like me to learn or use more efficiently?”
“Would you like to set a regular check-in schedule to review progress and feedback?”

🟢 Polite Check-In

“Hi [Client’s Name], I just wanted to check in—how are things going on your end?”

“I noticed things have been a bit quiet lately. Is there anything I can support you with at the moment?”

🟢 Offer Support

“Would you like me to take the lead on anything while things are settling on your end?”

“Are there any updates or priorities I should be aware of?”

Scripts

- Clarify Expectations

“Is there a preferred schedule or frequency you’d like for our updates going forward?”

“Would you like to realign our tasks or responsibilities based on your current needs?”

- Reaffirm Commitment

“I’m here and ready to assist whenever you need—just let me know how I can be most helpful.”

“Happy to adapt to any changes. Let me know what works best for you moving forward.”

Email References

Email 1: Gentle Reminder – Awaiting Tasks (Monday morning)

Subject: Quick Reminder: Any Tasks for Me This Week?

Hi [Client's Name],

I hope you're having a great start to the week! Just checking in to see if there are any tasks or priorities you'd like me to focus on this week. I'm ready to assist and want to make sure everything stays on track.

Please let me know how I can support you today.

Warm regards,

[Your Name]

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Email 2: Midweek Follow-Up (Wednesday morning)

Subject: Following Up on Pending Tasks

Hi [Client's Name],

I just wanted to follow up on my earlier message regarding any tasks or updates you may have for me this week. I want to ensure I'm aligned with your priorities and timelines.

Let me know how I can best assist.

Best,

[Your Name]

Email References

Email 3: Offering Support (Friday before clocking out)

Subject: Happy to Help – Let Me Know What You Need

Hi [Client's Name],

I noticed there haven't been new tasks recently, and I just wanted to check if there's anything I can help you with. Even small admin or follow-up tasks – I'm here to support you however I can.

If you're busy, I can even draft or plan a few things proactively – just say the word!

Kind regards,

[Your Name]

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Email 4: End-of-Week Wrap-Up / Follow-Up (Friday before clocking out)

Subject: Wrapping Up the Week – Any Tasks to Prepare For Next Week?

Hi [Client's Name],

As we wrap up the week, I just wanted to check if there's anything you'd like me to prepare or work on for the coming week. I'd love to stay ahead of your needs and help make things run smoothly for you.

Looking forward to your guidance.

All the best,

[Your Name]

Email References

Email 5: Still Available to Support You (anytime of the week)

Subject: Just Checking In – Still Here to Support

Hi [Client's Name],

Just a gentle follow-up to let you know I'm here and ready to take on any tasks you need assistance with. If you've been caught up with other priorities, no worries – just let me know when you're ready.

Looking forward to hearing from you.

Warmly,

[Your Name]

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Optional Template: No Tasks for 2 days

Subject: Support Check-In – Let's Reconnect on Priorities?

Hi [Client's Name],

I wanted to check in as I haven't received new tasks for a couple of days. I'm reaching out to see how things are going on your end and whether there are any updates or priorities I can help with.

If you're planning something soon or need assistance mapping out upcoming work, I'd be happy to jump in and support.

Let me know how you'd like to move forward.

Best regards,

[Your Name]

Email References

Always cc care@virtualelves.com.au when informing your client about your absence or thru the WhatsApp group channel (if this is available)

Email 6: Message to Inform Clients of Absence (as needed)

Subject: Notice of Absence – [Your Name]

Message (WhatsApp or Email):

Hi [Client's Name],
I hope you're well. I'd like to inform you that I will be unavailable to work on [insert date or range of dates] due to [brief reason – e.g., personal illness, emergency, etc.]. I apologise for any inconvenience this may cause and will ensure to catch up on pending tasks once I return.

If you need immediate assistance during my absence, you may contact Maria, for support at care@virtualelves.com.au.
Thank you for your understanding.

Kind regards,

[Your Full Name]
Virtual Assistant – Virtual Elves

Anticipate Needs

Spots potential issues or opportunities before they arise.

What Needs to be Done

Being proactive means thinking ahead and preparing for what's next. Instead of waiting for instructions or problems to arise, virtual assistants should anticipate their client's needs by identifying potential issues such as delays, lack of communication, or shifting priorities. Spotting these red flags early allows you to offer thoughtful solutions before being asked, demonstrating foresight, reliability, and a commitment to your client's success.

Proactive Thinking

Look ahead at potential issues and plan around them
Identify red flags (delays, silence, changing direction)
Offer solutions before being asked

VA SUGGESTED TASKS LIST

GENERAL ADMINISTRATION

- CALENDAR & APPOINTMENT MANAGEMENT (GOOGLE CALENDAR, CALENDLY)
- EMAIL MANAGEMENT (GMAIL, OUTLOOK, FILTERS, CANNED RESPONSES)
- FILE ORGANIZATION (GOOGLE DRIVE, DROPBOX)
- DATA ENTRY (GOOGLE SHEETS, EXCEL)
- INTERNET RESEARCH
- TRAVEL BOOKING & ITINERARY MANAGEMENT

COMMUNICATION & COLLABORATION

- EXCELLENT WRITTEN ENGLISH (GRAMMAR, TONE, CLARITY)
- PROFESSIONAL VERBAL COMMUNICATION
- EXPERIENCE WITH ZOOM, GOOGLE MEET, SLACK, MICROSOFT TEAMS
- CLIENT FOLLOW-UP AND TASK REMINDERS
- TIME ZONE COORDINATION

TECH & TOOLS

- PROJECT MANAGEMENT TOOLS (TRELLO, ASANA, MONDAY.COM)
- CRM PLATFORMS (GOHIGHLEVEL, HUBSPOT, ZOHO)
- ONLINE SCHEDULING (ACUITY, CALENDLY)
- FILE SHARING TOOLS (GOOGLE WORKSPACE, ONEDRIVE)
- SCREEN RECORDING (LOOM)

SOCIAL MEDIA MANAGEMENT

- CONTENT SCHEDULING (META BUSINESS SUITE, LATER, BUFFER)
- GRAPHIC DESIGN (CANVA)
- CAPTION WRITING AND HASHTAG RESEARCH
- SOCIAL MEDIA ENGAGEMENT AND INBOX MANAGEMENT
- BASIC ANALYTICS READING (INSIGHTS, REACH, ENGAGEMENT)

EXECUTIVE ASSISTANT VA

Time Commitment	Suggested Daily Tasks
5 hrs/week	1. Check & organise inbox (15 mins) 2. Update calendar & confirm appointments (15 mins) 3. Flag urgent emails for client (15 mins) 4. Brief daily summary or status update (15 mins)
10 hrs/week	**All of the above +** 5. Draft and schedule meeting reminders (30 mins) 6. Follow-up with key contacts (30 mins) 7. Prepare daily to-do list for client (30 mins)
20 hrs/week	**All of the above +** 8. Create SOPs or update task trackers (1 hr) 9. Conduct light research (30 mins) 10. Coordinate small projects (1 hr)
40 hrs/week	**All of the above +** 11. Join client meetings (1 hr/day) 12. Prepare meeting minutes & assign tasks (1 hr) 13. Assist in hiring/admin support (1 hr) 14. Take on more planning and high-level coordination (2–3 hrs/day)

SOCIAL MEDIA VA

Time Commitment	Suggested Daily Tasks
5 hrs/week	1. Check messages/comments (15 mins) 2. Engage with 3–5 target accounts (15 mins) 3. Schedule 1 post (15 mins) 4. Provide short update to client (15 mins)
10 hrs/week	**All of the above +** 5. Plan weekly content (1 to 2hrs) 6. Create 2–3 basic graphics (30 mins to an hour) 7. Analyse previous posts (30 mins to an hour)
20 hrs/week	**All of the above +** 8. Write captions and optimise hashtags (1 hr) 9. Manage 1 platform fully (1 hr/day) 10. Prepare weekly analytics report (30 mins to an hr)
40 hrs/week	**All of the above +** 11. Manage multiple platforms (2 hrs/day) 12. Coordinate content calendar with team/client (30 mins to an hour) 13. Community engagement strategy (30 mins to an hr) 14. Collaborate with influencers or partners (1 hr/day or more)

ADMIN VA

Time Commitment	Suggested Daily Tasks
5 hrs/week	1. Tidy shared folders (15 mins) 2. Update spreadsheets (15 mins) 3. Enter or update CRM data (15 mins) 4. Daily end-of-day recap (15 mins)
10 hrs/week	**All of the above +** 5. Research or gather information (30 mins) 6. Prepare basic reports (30 mins to an hour) 7. Create/update templates (30 mins)
20 hrs/week	**All of the above +** 8. Handle invoice/data processing (1 hr) 9. Coordinate internal tasks (1 hr) 10. Test and suggest automation tools (1 hr)
40 hrs/week	**All of the above +** 11. Manage full admin systems (2–3 hrs/day) 12. Continuous training (1 hr) 13. Set up process improvements (1 hr) 14. Client correspondence (1 to 2 hrs)

DIGITAL MARKETING VA

Time Commitment	Suggested Daily Tasks
5 hrs/week	1. Check communications (15 mins) 2. Monitor client platforms/tools (15 mins) 3. Update client with quick status report (15 mins) 4. Log completed tasks (15 mins)
10 hrs/week	**All of the above +** 5. Handle 1–2 recurring tasks or processes (1 hr) 6. Test/check systems (30 mins)
20 hrs/week	**All of the above +** 7. Run reports (1 hr/day) 8. Troubleshoot or optimise tools (1 hr) 9. Manage and refine workflows (1 hr)
40 hrs/week	**All of the above +** 10. Full ownership of systems/processes (2–3 hrs/day) 11. Propose strategies (30 mins/day) 12. Document SOPs and improvements (1 hr) 13. SEO management 14. Email newsletter

BOOKKEEPING VA

Time Commitment	Suggested Daily Tasks
5 hrs/week	1. Review and categorise transactions (15–20 mins) 2. Update expense tracker or software (15 mins) 3. Check client inbox for finance-related queries (10 mins) 4. Quick daily report or log to client (10 mins)
10 hrs/week	**All of the above +** 5. Reconcile 1–2 accounts (30 mins) 6. Prepare or review draft invoices (30 mins) 7. Record payments received (30 mins) 8. Update payables/receivables list (30 mins)
20 hrs/week	**All of the above +** 9. Weekly financial summary/report (30–45 mins) 10. Payroll preparation support (as scheduled, 1 hr) 11. Clean up outdated or duplicated records (30 mins) 12. Assist in budget tracking or forecasting (1 hr)
40 hrs/week	**All of the above +** 13. Manage full-cycle bookkeeping (2–3 hrs/day) 14. Prepare cash flow statements or P&L (1 hr) 15. Liaise with accountants or tax agents (30 mins/day) 16. Maintain organised digital filing of financial docs (1 hr)

Important Notes

Planned Absences / Vacation Leaves:

- All vacation or time-off requests must be submitted at least 2 weeks in advance and must be approved by your client/s before confirmation. Please coordinate with your TL and HR for proper documentation and scheduling.

Unplanned Absences (e.g., illness or emergency):

- Notify your client immediately via their designated WhatsApp channel or email, and inform your Team Leader (TL) as soon as possible.

Always cc care@virtualelves.com.au when informing your client about your absence or thru the WhatsApp group channel (if this is available)

Respond Proactively

Responds to messages, feedback, and issues with intention and care.

Common Concerns Observed with VAs (and how to improve as part of the Client CARE Program)

1. Lack of Clarity in Communication

Concern: VAs send vague or incomplete messages that lead to confusion.

How to Improve:
- Confirm tasks in writing.
- Restate client instructions to show understanding.
- Use bullet points or summaries in updates.

2. Not Proactively Asking Questions

- **Concern: VAs wait for clients to notice issues or gaps.**

- **How to Improve:**
    - Ask clarifying questions early.
    - Don't assume—verify deadlines, task details, and goals.
    - Use phrases like "Just to confirm..." or "Would you prefer A or B?"

Common Concerns Observed with VAs (and how to improve as part of the Client CARE Program)

3. Failure to Follow Up When Clients Are Silent

- **Concern: VAs stay idle or disengaged when clients don't respond.**

- **How to Improve:**
  - Send polite nudges after 1–2 days of no response.
  - Suggest tasks based on previous work or anticipated needs.
  - Notify the VEVA team if silence continues.

4. Waiting to Be Told What to Do

- **Concern: VAs don’t show initiative or suggest improvements.**

- **How to Improve:**
  - Look at client systems, workflows, or past issues and suggest solutions.
  - Prepare weekly suggestions for time-saving or growth tasks.
  - Position yourself as a strategic partner, not just a task-taker.

Common Concerns Observed with VAs (and how to improve as part of the Client CARE Program)

5. Inconsistent Updates or Progress Reports

- **Concern: Clients don't know what the VA is doing or if tasks are progressing.**

- **How to Improve:**
  - Send end-of-day or end-of-week summaries.
  - Include what's done, in progress, or pending.
  - Use consistent formats (Slack/email templates).

6. Poor Time Management or Missed Deadlines

- **Concern: Tasks are not completed on time or hours are underutilised.**

- **How to Improve:**
  - Use task tracking tools (Asana, Trello, Google Sheets).
  - Communicate early if there's a delay or bandwidth issue.
  - Plan your day with priorities aligned to client goals.

Common Concerns Observed with VAs (and how to improve as part of the Client CARE Program)

7. Lack of Confidence in Handling Concerns

- **Concern: VAs avoid addressing issues or delays, hoping they'll resolve on their own.**

- **How to Improve:**
  - Practice scripts for addressing concerns politely and professionally.
  - Be honest but solution-oriented (e.g. "This might take longer, can I adjust the due date?").
  - Escalate appropriately when needed.

8. Not Knowing the Client's Business Well

- **Concern: VAs work on tasks without understanding the bigger picture.**

- **How to Improve:**
  - Research the client's industry, competitors, and goals.
  - Ask: "What's your main priority this month/quarter?"
  - Align your support with their business objectives.

Common Concerns Observed with VAs (and how to improve as part of the Client CARE Program)

9. Not Asking for or Acting on Feedback

- **Concern: VAs don't initiate feedback loops or act on feedback provided.**

- **How to Improve:**
  - Ask: "Is there anything I can improve on?" or "How am I doing so far?"
  - Create space for monthly feedback conversations.
  - Track and implement suggested improvements.

10. Lack of Personal Ownership and Accountability

- **Concern: VAs blame tools, clients, or external factors for mistakes or delays.**

- **How to Improve:**
  - Own up to missteps and focus on what can be done better next time.
  - Use language like "Next time, I'll make sure to…" instead of excuses.
  - Reflect weekly on performance and ways to grow.

Required VEVA Forms

1. End of Day Report

This form must be completed by the Virtual Assistant (VA) after each client interaction to monitor task progress and serve as a reference.

2. Weekly VA Update

This should be submitted every Friday or Sunday of the week. All reports should be submitted by Monday of the following week at 8am PH time for review.

3. VA Month-End Performance Evaluation

This form should be sent by the VA to every client on the last Friday of the month. Add this as a reminder to your calendar, together with the email copy below, so you will not miss it.

4. Emergency Response Form

This form should be filled out by the VA as a backup in case an emergency occurs. The clients will be advised of this information for their consent.

Use the Emergency Response (VA Name + Client Name) Google Document to provide the information needed. Kindly download as a PDF and upload it to the form above by clicking the link.

5. Handover document

The handover document is provided to the VA whenever they start working with a new client. This is a written guide that provides essential information about a smooth transition during the beginning of the working relationship with the client.

It explains what needs to be done and any important procedures to follow.

Elevate the Experience

Goes above and beyond to deliver excellence.

From Task-Taker to Strategic Partner

The goal of every VEVA is not just to complete tasks—but to create value, build trust, and elevate the client relationship through proactive service.

1. From Task-Doer to Strategic Partner

- Go beyond what's asked—understand the why behind the task.
- Think like your client: What are their goals? How can I support them better?
- Offer ideas, not just updates. Show initiative instead of waiting for instructions.

Example:

"Based on your current focus on sales, would you like me to help build a CRM lead tracker or email follow-up sequence?"

2. Suggesting Process Improvements

- You see the backend—use that perspective to streamline, organize, or automate.
- Politely point out inefficiencies or recommend new tools or workflows.
- Don't wait for permission to suggest—show that you care about the long-term success of their systems.

Example:

"We repeat the same steps each week for your podcast uploads—would you like me to create a master checklist to speed things up?"

From Task-Taker to Strategic Partner

3. Proactive Planning = Peace of Mind

- Clients feel more relaxed and secure when you plan ahead and keep things moving.
- Always let them know what's coming next, offer suggestions, or flag what's missing before it becomes a problem.

Examples:

- "Here's what I've planned for next week—do you want to add anything?"
- "I noticed there are no scheduled posts for next week. Would you like me to prepare drafts in advance?"

4. Upselling with Integrity

- Upselling isn't pushy—it's about offering more value when the client needs it.
- If you're underloaded, suggest services that align with their business goals.
- Track unused hours or repeating needs and recommend ways to fill the gap.

Examples:

- "I have 3 hours open this week—would you like me to repurpose older blogs into LinkedIn posts?"
- "If you're planning a launch, I can help with email sequences, landing page review, or task tracking."

Elevating the experience isn't about doing more work—it's about thinking more strategically. When you anticipate needs, suggest improvements, and communicate value clearly, you don't just support your client—you become essential to their success.

Measurement of Success

The success of the CARE Program is reflected in each VA's key performance indicators (KPIs), such as consistent communication, task completion, client satisfaction, initiative, and reliability.

When VAs embody the CARE Program Framework, the performance aligns with higher client retention, stronger working relationships, and measurable growth in trust and value delivered.

Client CARE-Based KPIs for Virtual Assistants

How can we effectively achieve the Key Performance Indicators (KPIs) for VEVAs?

The Virtual Assistant (VA) will send the Month-End Performance Evaluation to the clients on the last Friday of each month. This serves as a method for assessing whether the VAs are meeting the established standards.

It is the responsibility of the VAs to ensure that this is being followed as scheduled and communicate this information to their clients, emphasising the importance of feedback in promoting continuous improvement and growth.

Email Copy when sending out the monthly performance evaluation:

Subject: Request for Feedback on My Performance

Dear [Recipient's Name],

I value your feedback and would greatly appreciate your thoughts on my performance for the month of ____________.

This is one of my key performance indicators (KPIs), and it would be helpful to know if I have met my goals or if there are areas where I can improve.

Please take a moment to fill out the ***VA Month-End Performance Evaluation*** *form. It would only take a minute of your time.*

Thank you very much in advance!

Best regards,

[Your Name]

Client CARE-Based KPIs for Virtual Assistants

C – Connect with Clarity (Expectation Management) = 15
A – Anticipate Needs (Proactive Thinking) = 15
R – Respond Proactively (Effective Communication) = 15
E – Elevate the Experience (Client Satisfaction) = 15

The clients will respond to questions related to the aforementioned KPIs to gain a clearer understanding of the virtual assistants' performance.

Missed Weekly Hours by a Virtual Assistant

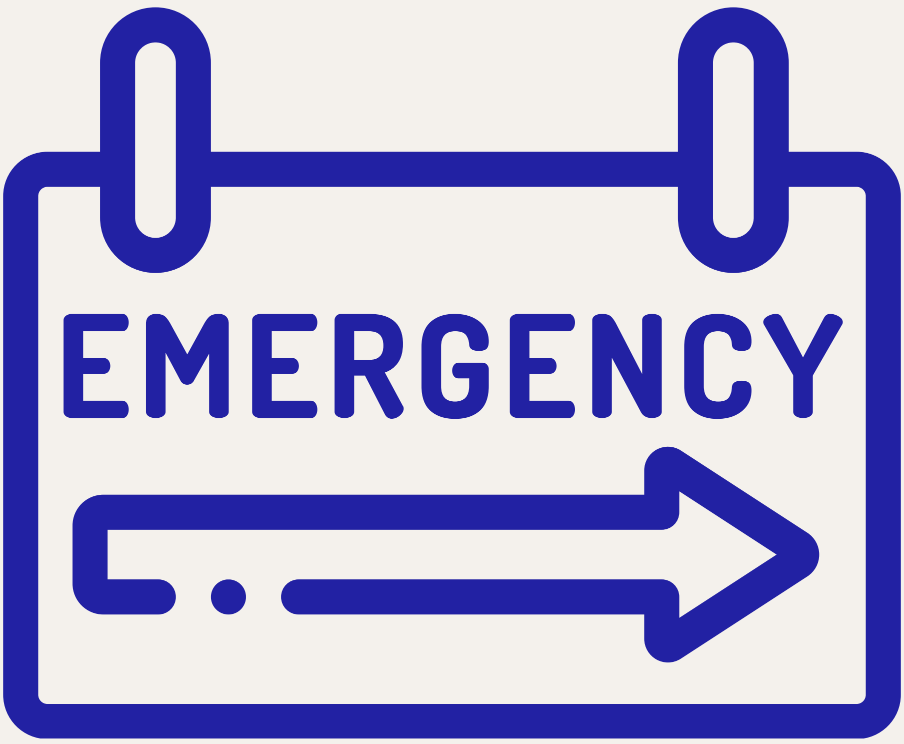
The Virtual Assistant (VA) must submit an explanation on why the weekly hours are not met based on the weekly report.

This is important to identify areas to improve and suggest to clients, with the help of the Client Care Manager, to address this issue effectively and ensure that the hours align within the agreed contract with the client.

Emergency Response Protocol

Preparedness in case of emergency is essential to ensure safety, minimise disruption, and allow for a quick, effective response.

Being ready with a plan and the right resources can make all the difference in the continuity of the business, specially for our clients.



Emergency Response Protocol

Purpose:

To set expectations on business continuity in case of:

- Medical emergencies with self and family members,
- Natural calamities,
- Absence due to loss of family members,
- Pregnancy or maternity leave
- Long-term power and internet issues

That may temporarily affect the VA’s ability to work or communicate.

Emergency Response Protocol

Timelines when a VA will be temporarily replaced based on the emergency response protocol:

After 48 Hours of VA Inactivity/Unavailability

Action	Responsible	Timeline
Attempt final follow-up with the VA	HR Manager	Day 2
Inform the client of the current situation	Client Care Manager	Day 2
Request emergency platform access by sending the form	Client Care Manager	Day 2
Offer available temporary VA for urgent tasks	Client Care Manager	Day 2
Assist the client with onboarding a backup VA	Client Care Manager	Within 24 hrs of approval
Resume work on the highest-priority items	Temporary VA	Immediately upon access
Transition/handover to the original VA once he or she is back	Client Care, Temporary VA and Original VA	After 3 or 4 days
Offer a replacement if the original VA is not back within a week	Client Care Manager	7 days

If no replacement will be made available, the Client Care Manager will temporarily support the client (upon approval) to ensure the continuity of work.

However, if the client is willing to wait for the VAs' return, the temporary VA will not commence with the work. If the VA did not show up or reach out to VE within the specified time, VE will recommend the replacement of the VA.

Emergency Response Protocol

Natural Disasters

Events such as typhoons, earthquakes, floods, and fires can disrupt operations unexpectedly.

Our Response:

- Safety First: Always prioritise the safety of our team members. Ensure everyone is accounted for and safe before proceeding with any operational steps.
- Alternative Communication: Activate backup communication channels (e.g., WhatsApp groups, emergency contact lists) to stay connected.
- Business Continuity: If needed, reroute essential operations to unaffected regions or remote support teams.

Emergency Response Protocol

Power Outages

Sudden loss of electricity can interrupt workflows, especially in remote work settings.

Our Response:

- Preparedness: Encourage all VAs to have battery backups or power banks, and where possible, secure access to co-working spaces or alternative locations.
- Offline Accessibility: Ensure critical documents, SOPs, and communication tools can be accessed offline.
- Client Transparency: Communicate any downtime to clients immediately and offer realistic timelines for resumption.

Cybersecurity Threats

Data breaches, phishing, and malware attacks pose serious risks to business integrity.

Our Response:

- Strong Cyber Hygiene: All team members are trained in best practices and follow stringent password and data protection protocols.
- Regular Audits: Conduct routine security checks, software updates, and vulnerability scans.
- Incident Response Plan: A clear and actionable protocol is in place to contain, communicate, and recover from any security breach.

Understanding why clients are leaving

Do not be the reason our clients choose to leave; instead, strive to be the reason they **STAY** with us.

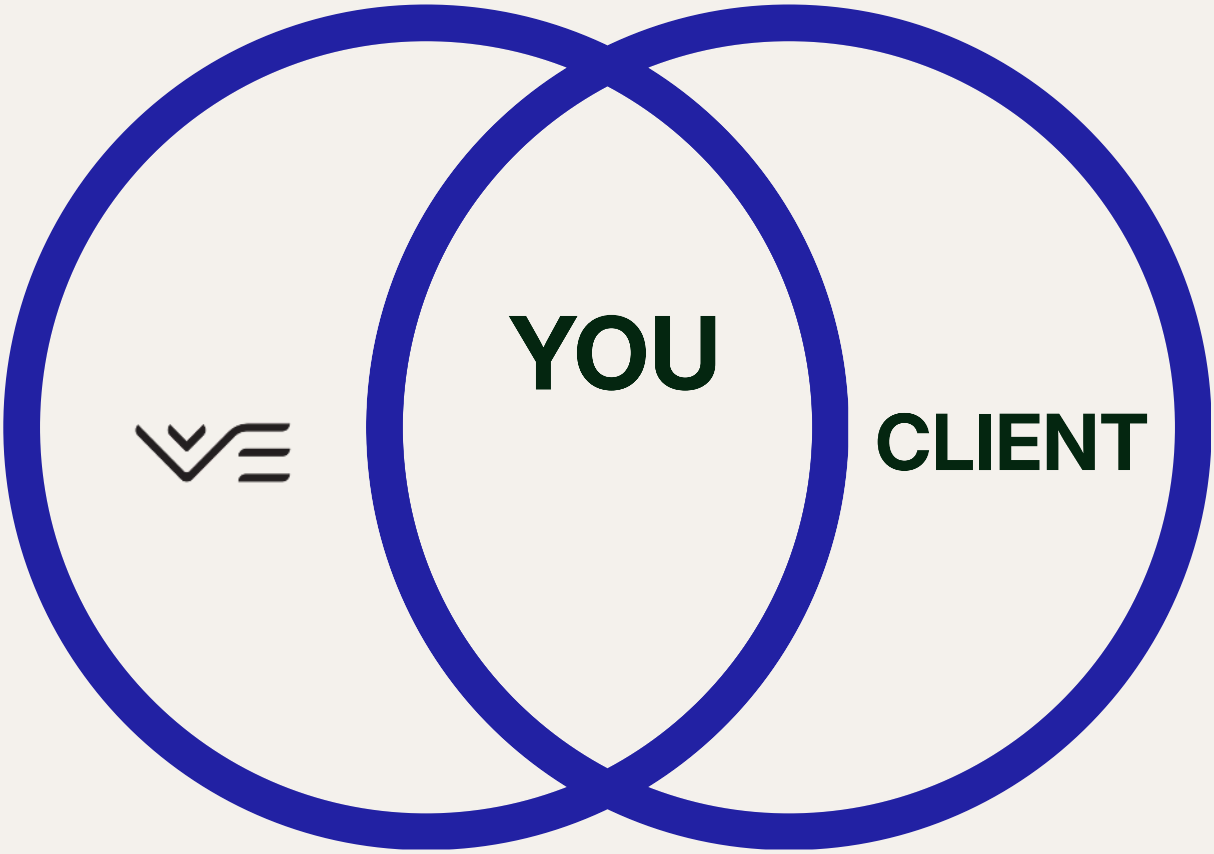
There are instances when clients may decide to discontinue our services. While some factors are beyond our control, many contract terminations arise from the client's perception of how valued, supported, and understood they feel in their daily interactions with us.

This is where you, our VEVAs, play a crucial role.

Your **actions, communication**, and **dedication** significantly influence client retention and satisfaction with our services.

AIM high to achieve our goals!

Remember, we are Partners for Growth



VEVA Acknowledgement

Acknowledgment of Commitment to the Client CARE Program

As a VEVA, I fully acknowledge that I have **read, understood, and agree** to uphold the principles and responsibilities outlined in the Client CARE Program.

That this falls part of the **ACCOUNTABILITY Form** that I have signed when I joined Virtual Elves.

I fully commit to providing consistent, high-quality support and communication to my assigned clients, and I understand that the **Client C.A.R.E. Program** is the standard process to adhere to, as part of achieving the organisation's goal in building and maintaining a successful and lasting working relationship with my client/s.

By understanding the **C.A.R.E. Program**, I agree to:

✅ Communicate proactively and professionally regularly
✅ Be accountable for my tasks, deliverables, and time
✅ Respond to client messages in a timely and respectful manner
✅ Deliver excellence in every aspect of my role

I understand that adhering to these standards not only supports client satisfaction and retention but also contributes to my professional growth and success as a Virtual Assistant with Virtual Elves.

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