

RepStack

HOW TO HIRE, ONBOARD & TRAIN VIRTUAL ASSISTANTS FOR MARKETING AGENCIES

Marketing Assistants
Sales Assistants
Account Managers

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RepStack

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HOW TO HIRE THE FIRST VIRTUAL ASSISTANT FOR YOUR DIGITAL MARKETING AGENCY

Do You Even Need A Virtual Assistant?

Here are the top five reasons to hire a virtual assistant:

- 1) Frees up time by letting you step back from the day-to-day activities:** Virtual Assistants can perform your core activities, you have more time to focus on growing your business. Rather than wasting time and resources in doing day-to-day operations, you can invest in thinking strategically and activating massive growth.
- 2) Reduced costs:** Most business owners and entrepreneurs hire Virtual assistants to reduce their overhead costs. This means lower salaries and operating costs.
- 3) Quickly scale your business operations:** Virtual assistants can also help you scale up your business operations quickly.
- 4) Strengthen weak areas:** Entrepreneurs like to be in control and doing things themselves. Let's face it: It's not possible to be the jack of all trades! With Virtual assistants, you can make up for the skill gap in your organization. It'll provide you with a pipeline of extra skill sets.
- 5) Offer 24/7 Customer Service:** Most VA's can work in international time zones.

Feel free to check out our **2021 Virtual Assistant Checklist** which will identify your need to hire. [View Now](#)



Do You Need To Hire A Virtual Assistant?

Goal: Identifying the need to hire an elite entry-level manager to fill one of these positions: Sales Rep, Marketing Assistant, Account Manager.

- ☐ Are you making at least \$10,000 in monthly agency revenue?
- ☐ Do you have at least two full time employees (including yourself)?
- ☐ Do you want to hire a full-time employee without thinking of long-term contracts, W-2 etc.
- ☐ Are you interested in hiring a paid advertising specialist i.e. social media marketing?
- ☐ Are you looking for an Agency Sales Representative who can close 5 figure deals?
- ☐ Are you handling all Inbound & Outbound sales calls yourself and need to fire up time?
- ☐ Do you want to focus on the strategic aspect of your business, while letting your VA manage all client-facing activities?

*you need to hire a Virtual Assistant if more than 3 were ✓
Learn more at repstack.co

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3 Roles To Hire For:

- 1) [Marketing Assistant](#)
- 2) [Appointment Setter / Sales Rep](#)
- 3) [Account Manager](#)

Sample Job Posts

Marketing Assistant: -

We are looking to hire an enthusiastic Digital Marketing Assistant to assist our busy marketing team. You will be reporting directly to the Digital Marketing Manager and assisting with all related tasks. You may be required to perform administrative tasks, conduct market research, update the system database, create marketing ad copies, and foster strong relationships with our clients.

To ensure success as a Digital Marketing Assistant, you should have in-depth knowledge of digital marketing techniques, excellent interpersonal skills, and be able to work to strict deadlines. Ultimately, a top-level Digital Marketing Assistant provides valuable assistance to the marketing team and boosts the company image.

Digital Marketing Assistant Responsibilities:

- Supporting the Marketing Manager and marketing team with project organization.
- Performing administrative tasks to ensure the functionality of marketing activities.
- Conducting market research and analyzing marketing surveys.
- Employing online marketing analytics to gather information from the web and social media pages.
- Updating databases, spreadsheets, and inventory lists.
- Preparing promotional presentations and organizing promotional events.
- Composing and posting online content for the company's social media page and website.
- Writing marketing copy for company brochures and press releases.
- Building strong relationships with customers.

Digital Marketing Assistant Requirements:

- Bachelor's degree in Marketing, Business or related field.
- In-depth knowledge of marketing techniques and databases.

- Proficient in MS Office and marketing software.
- Knowledge of CRM tools, Google Ads, and online analytics.
- Understanding of advanced marketing principles.
- Ability to multitask and meet strict deadlines.
- Excellent communication and interpersonal skills.
- Good understanding of office management.
- Ability to follow instructions and work independently on projects.

Sales Assistant: -

We are looking for a responsible and experienced virtual assistant to join our team. While operating remotely, the Virtual Assistant will organise and update files, answer calls and emails, and assist in creating presentations and sales materials.

The ideal candidate should be tech-savvy, able to communicate through multiple channels and be super organised.

Duties and responsibilities

- Answer and direct phone calls
- Manage communication and answer emails
- Prepare and organize databases and reports
- Manage social media accounts and replies
- Handles customer and employer information confidentially
- Take notes or transcribe meetings conducted online and share minutes of the meeting
- Schedule meetings
- Manage calendar and appointments
- Create purchase orders and track and manage payments
- Manage filing systems, update records, and organize documentation
- Online research for materials and sources for presentations

Job Requirements

- Graduate or above
- Proficient computer skills, including Microsoft Office Suite (Word, PowerPoint, and Excel) Experience with Google Docs, cloud services, and other technology tools.
- Well-versed with technology
- Highly organised multi-tasker and able to work on multiple instructions
- Demonstrates excellent time management skills

- Self-directed and able to work without supervision.
- Excellent verbal and written communication skills.
- Strong customer service and presentation skills..

Account Manager: -

We are looking for a skilled Key Account Manager to oversee the relationships of the company with its most important clients. You will be responsible for obtaining and maintaining long term key customers by comprehending their requirements.

The ideal candidate will be apt in building strong relationships with strategic customers. You will be able to identify needs and requirements to promote our company's solutions and achieve mutual satisfaction. The goal is to contribute to sustaining and growing our business to achieve long-term success.

Responsibilities

- Develop trust relationships with a portfolio of major clients to ensure they do not turn to competition
- Acquire a thorough understanding of key customer needs and requirements
- Expand the relationships with existing customers by continuously proposing solutions that meet their objectives
- Ensure the correct products and services are delivered to customers in a timely manner
- Serve as the link of communication between key customers and internal teams
- Resolve any issues and problems faced by customers and deal with complaints to maintain trust
- Play an integral part in generating new sales that will turn into long-lasting relationships
- Prepare regular reports of progress and forecasts to internal and external stakeholders using key account metrics.

Requirements

- Proven experience as a key account manager
- Experience in sales and providing solutions based on customer needs
- Strong communication and interpersonal skills with aptitude in building relationships with professionals of all organizational levels

- Excellent organizational skills
- Ability in problem-solving and negotiation
- BSc/BA in business administration, sales or relevant field

Pre-Screening Process:

- Have them send a video/voicemail intro to ensure they have strong enough spoken English speaking skills & that the accent won't be an issue.
- The accent would be especially important for Appointment Setter and Account Manager roles.
- Have them take a [Kolbe Assessment](#) (RepStack offers one free Kolbe Assessment if you choose to work with us).

The Interview:

- Tell me a little about yourself. Where you are from. What your hobbies are. What's important to you?
- What were you doing most recently? Why did you leave?
- What are your strengths...what do you feel like you do best?
- What type of work have you done with others in the past?
- What does your work environment look like? Do you have a quiet dedicated place to work? Do you have high-speed internet? What about your computer...
- What interested you in this position?
- Are you looking for a short-term or long term role?
- If we contacted your last employer & asked them to rate you on a scale from 1-10 (with 1 being terrible & 10 being the best). What would they rate you & why?
- If you choose to work with RepStack all the above questions are pre-verified during multiple vetting interviews.

Expectations to communicate

1. **Responsiveness.** Be quick to reply when I send a message and on top of the ball. To me, that is the most important aspect of this role. If I send a message during work hours and don't hear back quickly I will question how engaged you are in the position.
2. **Be resourceful.** I'll share with you what I need to be done and how to get around, but if you are stuck on something try to solve it yourself before asking me

or another team member. If it's something you could have solved by contacting support or doing a Google search first...then do that.

3. **Honesty.** Just be honest & forthcoming in all our dealings.
4. **Innovate.** We are an extremely fast-growing business. As you go about your job, we want you to find ways to improve things, make suggestions and enhance the way we operate.
5. **Work hard.** There is a lot to do. I'll need you by my side proactively learning, innovating and getting things done.
6. **Ask for help.** If you need direction, resources, support doesn't hesitate to ask...I want you to be happy, clear and fulfilled in your role. This should always be a win-win situation.

The VA Hiring Process Explained (Repstack):

- You Book a Discovery call with us.
- We hand-pick either a Sales Rep, Marketing Assistant or Account Manager (as per your requirement):

R1 (Round 1) - The Hunt	We build a JD according to the client's needs and start sending in requests.
R2 (Second Interview)	All unqualified leads are sorted to find the perfect VA for the position
R3 (Third Interview)	Our Sales team joins in on the selected candidates and checks if the client's requirements match the candidate's skills.
Dry Run (Fourth Round)	We look for any red flags that pop up in intense questions and answers sessions to check if they (the VA) can work under pressure.
Informal Meet & Greet	Meet and Greet explaining the company culture and vision.

- During our Pre-boarding process, your shortlisted VA goes through a minimum of 5 interviews with our internal team.
- We provide our VA's with any additional training materials (short courses, training webinars) as per your requirement.
- Intro-call Booked with your VA.

Pre-Onboarding - RepStack Exclusive Process

Currently only offered by RepStack, if you can get this process introduced using other sources it will add one more step to ensure you are getting the right VA. However, it may turn away some of the talents on Upwork.

16 to 20 hours of Pre-OnBoarding training (not billed to you) includes:

- Complete a customized 90-day learning path for the VA. The VA and RepStack build out the first draft and you approve it. Here is a template for such a plan: [90-Day Training Plan](#)
- VA gets introduced to company culture, our work ethic etc.
- Baseline training and assessment for the CRM of your choice completed by the VA
- Setup of all tools and software before day 1
- VA starts communicating and reports back to you daily so you can gauge communication style
- Stress-test work from home setup;
 - Internet speed, minimum 15mbps
 - Power backup in place
 - Work laptop with the right hardware provided to the VA
 - Any additional hardware needed to do the job provided
 - VPN
 - Home Office Setup verified
 - Setup of time doctor for the VA
 - Camera and lighting

OnBoarding

- What tools need to be set up for them? Who will set those up? Create a checklist.
- What will their orientation process look like?
 - Initial Day
 - Accessing Tools / Software
 - Communication Expectations
- How will they be trained in what you expect them to do?
 - Orientation on the roll
 - Training on the day-to-day
- What will they be expected to report daily/weekly / monthly?
- How will you gauge their performance
- Communicate the expectations!

Ongoing Training, Management & Accountability

When will they meet with you for feedback?

How will you continue to train & develop them?

Below are RepStack only processes, but you should have something similar present if you hire outside of RepStack:

- Bi-Weekly Training by Jeff Fisher - Coach at The Seven Figure Agency
- Bi-Weekly Training by RepStack
- Weekly CRM Training with Andrew Cass - Founder of PipelinePro.
- Udemy, Coursera Courses for VA's.
- Weekly VA Check-ins
- Monthly Client Check-ins
- Time Tracking Application: RepStack uses Time Doctor, while Upwork uses its native software.
- Tracking EOD reports
- Marketing Trainee program for fresh hires

Hiring Process Comparison - Freelancers Vs. RepStack

S#	RepStack	Fiverr, Upwork, Onlinejobs.ph
#1	Book a Discovery Call You Book a free discovery call with us on our Calendar, where we'll discuss your business model, your requirements etc.	Define A Budget Keep in mind that many freelancers are business owners; they pay their own taxes, insurance, and overhead. So their hourly rates may be slightly higher than an employee's. A USA-based VA usually starts at \$20/ hour. Offshore quality VA will be between \$7 and \$15/ hour.
#2	Leave The Rest To Us We will take care of the rest. No need to worry about hiring the right VA. Rest assured, we will provide you with our best talent	Create a Job Description Be extremely clear on your job description so you can attract the right people. RepStack can provide these JDs upon request
#3	R1 - The Hunt After building a Job Description, we start sending out requests according to the needs of the client	Start Shortlisting After you post your job description, it is time to start shortlisting candidates for your business. This process can be time-consuming.
#4	R2 - Second Interview Here all the unqualified leads are sorted to find the perfect VA for the position.	Find The Best Start interviewing your shortlisted candidates, by setting up a time and date and then scheduling a meeting.
#5	R3- Third Interview Here the sales team join in on the selected candidates and checks if the client's requirements match the candidate's skills	Assess Their Abilities Conduct an interview. Most freelancers work remotely, so this may be the only time you'll ever "meet" the person. When you conduct a video interview, you can gain a better sense of the person's abilities and fit than just talking to them over the phone. We also recommend a Slack-based interview so you can check their written communications.
#6	Dry Run - Fourth Interview The Dry run is a kind of simulation interview where we ask pressure questions and identify any red flags.	Hire The Freelancer When discussing project details, understand that both of you are negotiating an agreement that covers when the person can start, what they'll deliver, when those deliverables are expected, and payment terms. Unlike an employee, you don't manage or tell freelancers how to do their work, they control all that themselves.
#7	Intro Call With Client This is your first meeting with your future Superstar VA. 95% of the time we get a yes for the VA we bring forward to meet you.	Create & Sign A Contract Make your agreement official with a contract. Good contracts are detailed, yet concise so they're very clear. Your contract not only protects the business and the talent, but it also serves as proof to the IRS that you're not violating any worker classification laws.

#8	Pre-Boarding - Repstack Only We onboard the VA, start them on their learning paths you picked and open a communication channel with you. This 20 hours of intense training is free of charge for you and designed to pick out any final red flags before the VA onboards with you.	Rinse & Repeat Process (If It doesn't work out) You'll have to repeat the whole hiring process if you encounter any issues, for example, your freelancer being a no-show, financial issues (bank transfer), scam, etc.
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Key: We'll do it for you



Key: You're on your own



Performance Benchmarks - RepStack

Below is a sample process that RepStack conducts on your behalf.

Daily VA reporting, here are some sample day end reports for

- Marketing Assistant:
<https://docs.google.com/document/d/1BvKIH3dun1flB4rpB4PcyLt2-IGORhUq8Lbf4GNFQh8/edit>
- Sales Assistant:
<https://docs.google.com/document/d/1r6Y0SiMVKnVHcEJvnRb4RJ8BCfeAiD8SK2K1jXI4RIY/edit>
- Account Manager:
<https://docs.google.com/document/d/1rLlk4eXCMTpVHIq9GbSA6BxbsosXC-lwCpE1BgyJO3U/edit?usp=sharing>

Additional Resources

- 1) Recommended Agency Coach Josh Nelson - [The Seven Figure Agency](#)