

TRICIA SCIORTINO

RISE
UP &
LEAD
WELL

HOW LEVERAGING AN ASSISTANT WILL CHANGE
YOUR LIFE AND MAXIMIZE YOUR TIME.

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WILL CHANGE YOUR LIFE & MAXIMIZE
YOUR TIME**

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ADVANCE PRAISE

“I am so grateful Tricia decided to combine her years of experience exercising efficiency at the highest level along with transferring those skills in a digestible framework guaranteed to benefit all who heed and apply her insight. I specifically recommend this book for CEOs and Key Executives aiming to increase productivity and profitability! Praise to Tricia for writing Rise Up and Lead Well!”

– Anthony M. Flynn, Founder of Amazing CEO
& CEO at The WorkFaith Connection

“Warning: Life-changing content ahead! If you read this, your leadership will never be the same but incredibly enhanced. Tricia’s years of experience culminate into a read that will practically help you and your assistant execute on a whole new level. 10X your leadership now with this book!”

– Bryan Miles, Chairman of BELAY

“If you want to up your productivity by a significant multiple, then listen to Tricia Sciortino and do what she says. Tricia is the unique authority on this subject. She has been a virtual assistant. She has helped build the leading virtual assistant company in the world. And she is now taking that company to new heights as their CEO. I’ve followed her plan and it has paid big dividends in my own work with a VA”

– William Vanderbloemen, Founder and CEO of Vanderbloemen Search Group

“People that write eBooks usually major in thought leadership. Tricia majors in action leadership. From watching her as a part-time assistant, to executive assistant, to becoming a CEO of a company with over 1,000 people who have become assistants – there is nobody with greater authority in this area. This is a must-read for all college graduates, executives and breathing mammals who want to be effective at work.”

– Casey Graham, CEO, Gravy

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FOREWORD

BY CAREY NIEUWHOF

Visionary leaders have an uncanny ability to start something out of nothing, rally the troops, find momentum – even when no one else seems to be able to – and blaze a trail that would intimidate most people.

You know what visionary leaders are bad at? Um, well, we're usually not great with details. Or hiring. Or releasing the full potential of our teams.

Years ago, I learned that my default in job interviews was to become a salesperson, not a discerning, thoughtful talent selector. And as far as my empowerment strategy went, well, I thought the right approach was to hire the person and let him or her go.

Smart people figure it out, right?

Apparently not.

The stakes become so much higher when you're recruiting one of the most critical roles CEOs and senior leaders hire – an executive assistant.

Over the last few years, I have learned so much about teams, optimal working relationships, and how to find and develop great EAs from BELAY CEO Tricia Sciortino. In *Rise Up & Lead Well: How Leveraging An Assistant Will Change Your Life & Maximize Your Time*, a lot of that wisdom gets laid directly into your hands.

Tricia has written a short, powerful manual that will walk you through exactly what you need to look for in an assistant, how to make the relationship thrive, and how to organize your workflow so that everyone soars.

I wish I had this when I was starting out.

Whatever you're leading – and I've worked in law, churches, sat on boards, and now run my own communications company – everything gets better when the leader and the team get better.

As a friend of mine likes to say, 'You don't go as far as your dream. You go as far as your team.'

For all those reasons and more, you'll benefit from this book.

ACKNOWLEDGMENTS

BRYAN MILES

My first leader as a Virtual Assistant. The guy who gave a girl from NY a shot to be a VA when she came from a background in retail. Thank you for seeing something in me then – and now. You gave me chance after chance to rise up under your leadership and for that I am eternally grateful. That faith inspires me to be a faithful leader. Thank you to ‘my brother from another mother.’

MICHAEL HYATT

The master delegator and most humble leader I’ve ever worked for. Thank you for teaching me what leadership looks like and how to serve and leverage a VA well. Your patience and generosity will never be forgotten.

LISA ZEEVELD

My LZ. Thank you for always believing in me, supporting me and cheering me on. We’ve been friends for 15 years and work wives for 10, and I wouldn’t trade a moment of it. I’m proud to lead with you by my side.

MELISSA LAWRENCE

My magic-maker. My lifesaver. My EA of all EAs. Thank you for keeping me straight, holding me accountable, calling the shots, and being tenacious about the details. You make me a better leader. You are an example to all executive assistants.

BELAY LEADERSHIP TEAM

The truest group of leaders a CEO could ask for. Authentic, committed and loyal to each other and the mission at BELAY to serve others.

PAUL PUCHALSKI

The man behind this driven woman's curtain. Thank you for being my secret weapon. The caretaker of my heart and soul. You've taught me to stay focused in life and helped me recover from workaholism. You said, 'We work to live. We don't live to work.' That – and you – have changed my life and still do every day.

RILEY AND HAILEY

For keeping me humble and grounded. There is nothing more humbling than two teenagers who have no clue what you do for a living, nor care. To them, I'm just mommy – the cool, hip-hop loving, messy-bun wearing mama who cusses too much. Thank you for being fun, silly, open and loving. I do all I do for you. I found BELAY on my path to give you a better life and be a present parent. For you, I am found.

DAD & MOM

Dad, the driver. Mom, the saint. The pair who expected the absolute best from me and taught me what it meant to be present and all in. Thank you for instilling hard work, heart, tenacity and excellence in me. I knew early on I could do or achieve anything I wanted to because of you. There was no glass ceiling. I've carried that with me into my adult life and have mirrored your leadership into my life and work.

INTRODUCTION

The scene: Charlotte, North Carolina.

I work from my home office, running an incredible organization with a *seriously* exceptional executive assistant at my side.

Well, not *exactly*.

Plot twist: Melissa is *actually* 300 miles away in Atlanta, Georgia.

She also works from her home office, yet it *feels* like she's in the next room, supporting my *every* need as CEO of a high-growth organization.

I *could not* lead BELAY without her. And that isn't just flattering hyperbole or fawning humility.

It's God's honest truth.

For the unfamiliar, I was once a VA myself. I was, in fact, BELAY's *first* VA. So I've actually sat on the other side of the fence and supported clients as a virtual assistant. I've walked the walk – and that perspective helped me learn how to have a great assistant and leverage her.

That said, Melissa and I have had to *actively* master working well together.

In fact, that *really* should be the first lesson on how to work with your VA:

Accept that, like all good things, it will take time.

If you've ever hired a new employee, I'm *sure* you've experienced that roller coaster surge of excitement as you find the perfect person to fill the position, followed by the realities of training that person for the job.

You know – all those steps between their first day and them being fully trained to succeed and crush it in their new role.

Onboarding and training a new remote employee is hard because it takes patience and the ability to trust the process recognizing that – *again* – good things take time. Often, we're tempted to rush the onboarding process to cut to the chase and let me tell you: Resist this urge.

It is a huge mistake.

In fact, onboarding and training doesn't stop after the first few weeks. Those first two weeks won't get you the long-term success you want.

It's like any other relationship: The more you put in, the more you'll get out of it.

So here, I'm sharing *everything* I've learned – sitting on both sides of the desk – about how to work successfully with your VA so you can, too.

CHAPTER 1

MEETING: THE MOST IMPORTANT MEETING OF YOUR WEEK

First, raise your right hand and repeat after me: I promise to make one-on-one meetings with my VA a priority.

Seriously – please make one-on-ones with your VA standing meetings, or block time every single week where you know you’re going to get face time via Zoom, for example.

Because here’s the truth about these meetings: They aren’t just for you. They’re for your assistant. They need access to you and your time to help move things along. You are their leader. There is no auto-pilot button here.

So these meetings are critical to the success of a work-from-home engagement. As remote leaders, this is our time to ask questions, talk through priorities, get clarity where needed, and make sure that they’re moving the ball down the court – and that requires some recalibration.

Some things that were priorities last week may no longer be priorities for this week. And these conversations really help uncover that. You can also share feedback with one another during these calls because feedback often doesn’t translate well via email or a voicemail or text.

So having those conversations eyeball-to-eyeball is super productive, builds the relationship, and creates a real sense of honesty where you can share and receive feedback.

Make this time a priority for you and your VA and it will truly help your momentum, productivity and, ultimately, your shared success.

What this looks like in application...

Setting the week up is the single most important thing I do to have a successful week – so Melissa is my first meeting every week:

- We have our one-on-one Monday morning at 9 a.m. on Zoom.
- We meet for 45 minutes to an hour.
- We make sure she understands what her priorities are for the week.
- We confirm that she has what she needs to help me.
- I take the opportunity to talk about what's coming up for me.
- I tell her some of the things with which I'll need her help.
- I tell her things she might not already know.
- I answer any questions she has.
- I take the opportunity to ask how I can support her.
- What are the top 3-5 'Bigs' she is working on this week?
- How can I help her this week?
- Any professional and/or personal development she is advancing in this week?

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- Is there anything I should just know about her week, like doctor's appointments or having kids home from school?
- And then, at the end of the week, Melissa sends me a recap of what's been accomplished. That way, I have a really good idea of all that's been done, what still needs to be done, if there are any questions, and if there are any hurdles to wrap up the end of our week.

She *also* sends real-time updates as things are completed or scheduled throughout the week so I see action and movement – and can mentally let go of those tasks.

CHAPTER 2

INBOX MANAGEMENT: LIVING IN YOUR EMAIL? DON'T.

Email management can be one of the most valuable ways a VA can support a client, but it is also one of the most challenging as everyone has a specific way they like to see, manage, and store the information they receive in their inbox.

It can also be one of the hardest things for clients to let go of – *GUILTY!* – and fully empower their VA to manage for them.

However, once the right systems are in place, you regain multiple hours in your workweek by having your VA manage your inbox. And let's not even get started on the mental bandwidth that's freed and the peace of mind you can both achieve when your inbox has been tamed.

A quick reminder: Your inbox is not ...

- a place to manage a project
- a place to remember appointments
- a place to leave decisions for later
- a place for action

What your inbox is – or *should be*? It *should* be a place for communicating with your internal team or your external clients or vendors.

What this looks like in application...

I don't know what I would do without my email. It's what drives what I'm doing in my day.

So Melissa and I have our own system that works for *us*. That said, it should be noted that systems are only as good as the peace they provide the owner of the inbox so what works for me may not be the silver-bullet system that works for you.

It should *also* be noted in the interest of full transparency that we tried *multiple* iterations of inbox management – and fell off the wagon a few times – but kept it a high priority, knowing email can bury a leader.

So my advice is to take your time to find what best suits *your* needs.

For my inbox, we use a starring mechanism in the Gmail suite.

It looks a little something like this...

- If I want her to reply to something on my behalf, I put a star on it and she will reply.
- If she gets to an email before me, she will star it, which means I know she's actually already replied on my behalf, including scheduling requests.
- When she is unsure of how to respond on my behalf or there is information or insight needed from me, she will draft a response for me to review, edit as necessary, and send.

- She removes spam.
- She creates filters so that certain items go into folders for me to read later.
- When I am out of the office, she is in there and replying to what she can.
- When I am out of the office and something is *urgent*, she'll text me because she knows I'm intentionally not going to look at an email.
- We have a folder system, like a read folder and an action item folder.

I've learned that when I have a *very* full inbox, it causes me stress. So just knowing she's handling it provides me mental relief.

And full disclosure: Whenever I spend too much time in my email, Melissa will – deservedly – smack my hand. Sure, it's a *figurative* smack since she's virtual, but she is empowered to call me out to get me out of my inbox.

CHAPTER 3

COMMUNICATION: UNLESS YOUR VA IS TELEPATHIC.

We've all been there: We say one thing, but the person we're speaking to hears and interprets something else entirely.

And so we really have to be very conscious about how we're communicating – and even more so when working remotely.

So communication – clear, explicit and thoughtful communication – is, at least for us, the foundation for, well, everything when working remotely. Because regardless of industry, job or even whether you work in a brick-and-mortar office or virtually, how we express our expectations and needs inevitably impacts and affects every outcome.

Both you and your VA will experience the same learning curve, albeit on opposite sides of the equation.

What this looks like in application...

Developing your preferences and being clear on what communication is used and when will help keep things clear.

For Melissa and I, whenever possible, we try to cater communication to our pre-established preferences for any given scenario. We love IM and chat but I know many leaders who don't.

Pick your lanes and stay in them.

It looks a little something like this...

- We communicate daily, whether on Zoom, phone, email, text, and IM.
- It's important for Melissa to be responsive because things move fast and often need to be accomplished quickly.
- Communication is a two-way street – that many leaders miss – so I need to be responsive, too. If she's shooting me a quick question, it's a priority for me to answer her over anybody else because I don't want to be a roadblock for her.

CHAPTER 4

TRAINING: YOU GET WHAT YOU PUT IN.

'Train people well enough they can leave. Treat them well enough they don't want to.'

Sir Richard Branson's got a point.

In business, training is often overlooked because the focus is on other important things, like sales, cash flow, marketing, and more.

But – and I'll repeat this until forever and ever amen – there is nothing more important and critical to the success – or failure – of your business than your people.

And the first few weeks are the most critical.

What this looks like in application...

The training I provided Melissa is, in large part, specific to me, my needs and objectives. How she supports me is unique to me, so my involvement was – and is – critical.

Every VA leader is going to have very specific likes and dislikes so here's a broad overview of what worked for us.

Week One:

Training

- Set 30/60/90 day goals (use the attached worksheet and the one below)
- Train on 1-2 priorities and quick-win tasks, including corresponding tools
- Discuss Ideal Work Week
- Train on tools, processes and systems
- Introduce your VA to other employees and colleagues

Check-in/Share Feedback

- Set a quick touch-point call: Questions, roadblocks, feedback?
- Have your VA send daily or weekly progress report on workflow, task completion, training and to ask for additional support as needed

Calibrate

- 1:1 Meeting: Continue training, discuss goals and expectations, and initial quick-win tasks

Week Two:

Training

- Train on next 1-2 priority tasks and projects, including corresponding tools
- Meet and train with other team members where applicable

Check-in/Share Feedback

- Share real-time feedback with one another leveraging preferred communication method(s)
- Have your VA send daily or weekly progress report on workflow, task completion, training and to ask for additional support as needed

Calibrate

- 1:1 Meeting: Evaluate progress and share feedback.
- Ready for additional tasks and training?
- More space needed?

We also offer a comprehensive training VA training course, our Ultimate Virtual Assistant Master Class, [here](#).

There, VAs can learn all things essential to becoming a rock star virtual assistant. We're talking nuts-and-bolts, nitty-gritty, everything-you-need-to-know kind of information to equip them to serve you well.

But know this: As I mentioned earlier, you're not done. Training and development is forever. People – and organizations – don't stay stagnant, so neither should you or your client.

You grow. The work grows. Your skills grow. Wash, rinse, repeat – forever.

CHAPTER 5

TIME-TRACKING: GETTING WHAT YOU PAY FOR

We get this one *a lot*. And understandably so. You pay for a service and you want to make sure you get what you pay for.

Since virtual assistants work flexible schedules, it's important that they keep track of their time.

This ensures that they're meeting their commitment to you as all contractors are hired for a set number of hours, and also to respect their own time. Each leader and their virtual assistant can set their own parameters for how they want to communicate about time, but here are some common practices for how and why our virtual assistants track it.

Thankfully, this is an easy question to answer!

What this looks like in application...

Weekly Updates

Especially in the beginning, it's important to regularly communicate about hours. You're both still figuring out the VA's responsibilities, how long it takes them to complete their work, and how best to prioritize tasks.

Doing a quick poll of our contractors, we found many who, regardless of how they've been working with their client, still send a weekly status email detailing where their hours went for the week.

Mid-week Adjustments

Another important reason for your virtual assistant to closely monitor time is that it allows them to gauge throughout the week if they have the bandwidth for you to delegate additional tasks to them or need further clarification from you to prioritize tasks when they're running over on time.

Know Where Your Time Goes

It's easy to get caught up in a new project or stuck in a routine and not realize where your time is going.

Their time-tracking helps both you and your VA know where they're spending most of their time so you can adjust as needed.

If, for example, a VA's main responsibility is to handle social media but secondary tasks often steal their focus, knowing how much time they spend on other tasks provides a better idea of what's distracting them from their top priority and how to prioritize better.

Popular Tools For Tracking

There are lots of ways your VA can keep track of their time. It can be as simple as pen and paper or a desktop or mobile app.

Toggl allows VAs to track hours, make notes about any particular project, and present information in a pie chart or bar graph – arguably its best feature. HoursTracker app is another popular option.

It can look a little something like this...

- If your VA contracted for 40 hours a month, for example, remember it doesn't have to be exactly 10 hours a week.
- You may have a 10-hour week, a six-hour week, and two 12-hour weeks – and it all equals 40 hours.
- If, for example, you know your VA will take time off for a holiday or vacation, you can give them some other tasks the week or two before to balance out the hours.
- They're going to get paid for the 40 hours regardless, so you should use the time you're paying for.

CHAPTER 6

PERSONAL USE: LEVERAGE YOUR VA FOR YOUR ENTIRE LIFE

A quick Google search of ‘things to outsource to a virtual assistant’ yields some very impressive – albeit overwhelmingly lengthy – lists.

‘137 Tasks You Can Outsource To A Virtual Assistant’ and *‘98 Tasks You can Affordably Outsource to Virtual Assistant Services’* and *‘100 Tasks You Can Outsource to a Virtual Assistant’* and the lists go on ... and on ... and on.

Because when you actually stop and think about all the things you do on a daily basis, all the things begin to add up – and quickly. So it’s no small wonder that any lists rattling off all the things a VA can do are seemingly endless.

But you know the intense, full-body rush you feel when you cross something off your to-do list? A VA can give you the ability to start crossing more of these items off your lists, one giddy pen stroke after another.

What this looks like in application...

I use Melissa for personal tasks as well. She makes my hair appointments. She makes my nail appointments. I have friends who use their VAs to make

doctor's appointments. She schedules massages, she helps coordinate personal vacations.

She researches projects I'm doing at my house or repairs that I need, where it takes time to do that research.

Not sure how you'd leverage a VA for personal use? No worries! I've got plenty of examples to share.

It can look a little something like this...

- Send your spouse flowers or a gift on their birthday or on your anniversary.
- Research travel packages and book your next vacation.
- Schedule swoon-worthy social media posts with photos of aforementioned vacation.
- Buy basic necessities – or anything, really – online and have them shipped to your door.
- Find a dog walker to take Fido out.
- Locate your phone left in the third stall of a Denny's restroom in Albuquerque.
- Navigate all the necessary documentation requests to establish a Flexible Savings Account.
- Hire a designer to get a website up and running.
- Start a Google calendar to manage speaking engagements.
- Send thank-you cards and notes.

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- Locate an exact replacement for a child's favorite – but obscure and discontinued – stuffed animal.
- Track down the sheet music for a very specific piece of music you want to learn to play.
- Update frequent flyer accounts.
- Start a database that tracks favorite restaurants by neighborhood.
- Figure out how to get Showtime Anytime and HBO Go to work on your iPad.
- Order your groceries for you.
- Record and transcribe your meetings.
- Make reservations for a spontaneously romantic dinner for two at a fancy restaurant.
- Send you twenty email and text reminders so you don't forget aforementioned fancy dinner for two.
- Record themselves reading NY Times Best Sellers so that you can listen to them – and then tell people the book was so much better than the movie.

CHAPTER 7

TOOLS & RESOURCES: CHOOSING THE RIGHT TOOLS FOR THE JOB

There is no shortage of tools available out there, so it's really important to review and carefully evaluate your specific needs in order to be able to lean into the best tools and maximize the value of their features and capabilities.

And since we live in a world that is powered by technology, applications and programs are constantly evolving and being updated with new functions, so it's important that your VA stay current and up-to-date on the latest and greatest tools, options, and features.

However, it's also important to note that while it's critical to stay in-the-know, it's equally important to only leverage those tools that prove helpful and necessary.

It's about choosing the right tools for the job – and not all the tools.

What this looks like in application...

Melissa and I tend to just stay within the Google suite. We use Google tasks to stay in communication about the things that she's working on for me. That

said, we tried Trello, Asana and Slack but ultimately, we found that those were just another place I had to go look for things.

And so for me – again, this is personal preference – having fewer places to go to communicate was best so we stay in the Google suite because that's where I already am.

For those uninitiated, we have a few company-wide favorites that have served us – and our clients – well:

Zoom

Video conferencing applications like Zoom allow virtual teams to maintain intimacy from anywhere.

Google Docs

Google Docs remains the gold standard as a streamlined, no-nonsense platform that allows real-time collaboration from anywhere. It comes with ample cloud space and is free.

Slack

With Slack, you can collaborate by bringing the right people and information together in a one-stop shop where you can communicate efficiently, stay connected, and get things done – faster.

Basecamp.

It combines communication and collaboration by providing the tools you need to set up to-dos, discuss ideas, plan marketing campaigns, create a schedule, create and upload documents and files, message and chat with your colleagues, and check in regularly.

Dropbox

Think of Dropbox as a giant, virtual file cabinet. Team members can upload files easily and grant access to their coworkers. As soon as a file is edited, everyone will have access to the updated copy, saving tons of time and confusion from messy email chains and attachments.

Asana

Asana is a cloud-based software that facilitates colleagues within an organization to track and manage the progress of projects. You can add tasks, assign them to colleagues, set due dates, comment, and share relevant documents while notifications on the status of each task – and their approaching deadlines – are sent to your inbox.

CHAPTER 8

SCHEDULING & TIME-BLOCKING: MAKING THE MOST OF 24 HOURS

So much to do, so little time.

But really, maximizing productivity comes down to — in large part, anyway — strategizing your week by prioritizing their tasks to schedule time for meetings, activities, appointments, deep work, and administrative duties. It also includes blocking for fundamental items like project work, scheduled days off, family and friends, and even fitness or other health goals.

Having your VA establish your Ideal Work Week is an effective way to keep your priorities in line, increase productivity, and make your work easier because you'll be better equipped to anticipate what lies around the corner.

What this looks like in application...

If you're not familiar with the rock, pebbles, and sand jar analogy, the short version is that our time is like a jar, in which we must find room for all our rocks, representing the most important projects and things you have going on; the pebbles, representing the things in your life that matter, but that you could live without; and the sand, representing the remaining filler tasks.

My preference is to have three or fewer meetings every day. Knowing that, Melissa will schedule my days and block time accordingly.

Using the Ideal Work Week and time-blocking helps me:

- Save time and increase efficiency
- Stay accountable to my priorities and time management goals
- Establish a weekly rhythm by grouping similar types of meetings and tasks to increase my productivity and focus
- Align certain tasks and meetings for when I am at my best and have the energy to complete them. For example, I'm sharpest in the morning, so I schedule my most important meetings or strategic work then.

It looks a little something like this...

Determine your big rocks.

- Meetings
- Appointments and Other Prior Engagements
- Travel Time
- Other Top Priorities, Like Family

Determine your pebbles.

- Project Time
- Administrative Duties
- Strategizing

- Meeting Prep
- Paperwork

Determine your sand.

- Email
- Phone Calls
- Social Media
- Coffee With A Friend
- Self-Care Activities

Establish recurring time-blocks.

- Top Priorities
- Prep Time
- Recurring Blocks
- Self-Care Blocks

CHAPTER 9

FEEDBACK: CREATING A FEEDBACK CIRCLE

Listen. People never intend to fail or let you down. They don't ever intend to do the wrong thing. They don't ever intend to not meet your expectations. People just want to do well.

And that's why feedback is so important in order to course-correct and equip your VA with what they need to serve you well.

What this looks like in application...

For me, I give immediate feedback. Melissa never has to wonder if she's going in the right direction with something. Nothing ever bubbles under the surface to where we have to have this big courageous conversation because I've been feeling a certain way because she's not serving me well.

Feedback is woven into our everyday dialogue; it's just part of our conversation. I think that's naturally how I lead. I think anybody that works for me would say the same. I'm just a very open communicator.

You're never going to have to guess where you stand with me.

The Whys

- It addresses blind spots, challenges people to grow daily, and expands their opportunities.
- People want to know when they aren't hitting the mark. They want to do well.
- Status quo kills morale.
- It moves the ball forward.

The Hows

- Tone. Frame feedback as a positive experience by talking about it often and setting the expectations that it is a gift.
- Frequency. Do it in your day-to-day. Give more in-depth feedback or coaching on weekly 1:1s or at quarterly review time.
- Method. The best method for giving feedback is in-person or on video conference.
- Applicability. Feedback needs to be actionable with time-bound, expected next steps.
- Follow-up. Inspect what you expect. Check and review the progress daily and weekly until you see continued improved results, then pull back.
- Reciprocity. Encourage your VA to give you feedback, too.

CHAPTER 10

SETTING & MAINTAINING BOUNDARIES: MUST-HAVES, NOT NICE-TO-HAVES

I won't even bother rhetorically asking if you often find yourself feeling overwhelmed by every ding, ping, and menacing red-number notification on your every device.

I already know the answer.

Because if you're anything like anyone else living this side of the 21st century, all of the instant-ness of our digital world is enough to drive you mad.

You need boundaries. Working from home certainly has its perks but often, it's hard to turn work off and turn life on – like fully present 'on' – so boundaries and learning to say no are paramount to your success.

What this looks like in application...

For me, it's been an evolution.

I'm personally really good at saying no and having boundaries, but I needed to equip Melissa with an understanding of what my boundaries are and empower her with the confidence to eventually make those judgment calls on her own.

If I overwhelm myself and say yes to everything, I'm going to be up against a wall – and I don't feel good. I'm exhausted. I'm burnt out.

Been there, done that.

So when requests come in, she has learned over time – 'over time' being the operative phrase here – to determine what I need to do, what I don't need to do, what can wait and what can be handed over to another leader.

And if she's ever not sure, she'll just ask.

I also firmly believe that having the Ideal Work Week we discussed earlier helps us prioritize my time, even before requests come in.

It looks a little something like this...

Delegate. We covered this but it bears repeating. Adopt the '70 percent rule' that says '... if the person you'd like to perform the task is able to do it at least 70 percent as well as you can, you should delegate.'

Prioritize. Every morning, make a list of those items that need your immediate attention and share with your VA. Anything that can wait, should.

Monotask. We've been indoctrinated with the belief that multitasking is the only '-tasking' – but more often than not, we do better when we focus on one thing at a time.

Start Early. Most successful professionals have one thing in common: They start their day early to have time to quietly plan their day.

Interval Work. Try organizing your workday into 15-minute segments as that's often long enough to get something done – and short enough to find that time in your day.

Adjust Your Meetings. Schedule meetings at 15 minutes past the hour and end them on the hour. In three 15-minute ‘chunks,’ people can often accomplish in 45 minutes for what they think they’ll need 60 minutes.

Say No. Seriously. It’s OK. Politely decline additional tasks if you’re already overloaded with work. And if you think you can say ‘yes,’ make sure to review your list of priorities first.

Avoid Distractions. Resist the urge to check unrelated distractions at work – Hello, social media! – while you’re working.

Stick To One Screen. Work on just one screen at a time. If you’re on your computer, keep tablets, phones, smartwatches, carrier pigeons and all other tempting distractions out of reach.

Know When You’re Done. Often, you can actually complete the task faster by taking a break and allowing your brain to switch gears for a bit.

Recognize Bonus Time. Rather than be frustrated to learn that your flight’s been delayed or an appointment is running late, you and your VA can shift perspective and view these ‘inconveniences’ as opportunities to tackle smaller, lower-priority tasks that have been nagging you, like responding to an email or returning a call.

CHAPTER 11

DELEGATION: GET OUT OF YOUR OWN WAY

Warning: Real talk here.

Most leaders suck at delegating. Yup, I said it.

We hoard everything because we think we can do it better or faster. Why? Because it makes us feel good and accomplished and important. We hoard out of fear.

Guys. We have to let this stuff go. Get out of your way. You cannot grow your leadership or organization if you are in the administrative weeds. Just stop it right now.

Delegation – effective delegation specifically – is mission-critical. And as more organizations move toward a remote workforce, leaders must be adept at delegating. But delegating isn't easy – it takes practice and commitment, and can be the difference between accelerated growth and stalling out.

So Melissa didn't just walk in on the first day and know how to manage my inbox or know what I needed for my calendar.

There was a lot of investment of time that we put into her understanding my preferences and what I needed.

What this looks like in application...

Delegation takes work – especially for someone like me. I'm a control freak and if I could, I would do all the things – but I've come to accept that I can't.

And so my mindset is now that I get in my own way if I don't delegate. I have got to stop doing things because I need to and instead focus on doing the things only I can do.

I'm often asked, 'How do you hold your VA accountable? How do you know she's putting in her and getting her job done? How do you keep her motivated?'

The answer is simple: Results. It's not about hours or processes; it's about results. I don't delegate tasks; I instead choose to delegate results.

So once you get really in the mindset that certain tasks aren't the best use of your time, it becomes easy to just let stuff go.

It looks a little something like this...

I rely on three tenets to lay the foundation to achieve those results.

1. **Clarity.** You have to be very clear on what the job is, what the job entails, and what the expectations are for it. In tactical application, clarity is key – like due dates and timelines for completion. Don't assume someone knows when you want or need something done.
2. **Metrics.** You have to measure. You have to have some way of tracking the functions of that job and whether your expectations are being met – or not. You have to inspect what you expect.

3. **Communication.** You have to communicate if there are gaps in those expectations. Maybe the training wasn't good enough in the beginning. Maybe the role was too big for what you hired the person to do. Maybe you failed to delegate it well. Maybe you missed details and expectations. So you have to have accountability layered on top of the trust for someone to do that job.

Then, we rely on these guiding principles to ensure the results we want.

Know Your Own Process. You can't teach – or effectively delegate – something you don't know and understand yourself. So make sure both you and your VA understand your expectations and provide the necessary training to set everyone up for success.

Discuss & Assign Projects. Host weekly one-on-one calls to proactively discuss delegated projects, questions, or concerns. Further, consider bi-weekly or monthly all-calls with your VA to update each initiative's status and address any questions to get – and keep – everyone on the same page.

Use Collaboration Tools. Calls, texts, or voicemails work fine for casual conversations, but to emphasize a deadline or celebrate an accomplishment, virtual collaboration tools work best.

Details Matter. Be sure to document everything – maybe in a collaborative project management platform – in order to create a chain of communication that your VA can reference. There, they can upload emails, documents, images, and other files so everyone can access them as needed.

Be Inclusive. When there are important decisions to make or tasks to complete for a particular project or initiative, be sure to include your VA on emails. This will serve to not only let you both know what has been completed and

by whom but will also help your VA stay aware of the status of each project as it's handed off.

Divide-and-Conquer. When it comes to delegating effectively, it's important to remember that your VA plays an invaluable role in the completion of projects, tasks, and initiatives. Be sure to break each into smaller deliverables so they can get in where they fit in.

Now... Let Go. If you've successfully navigated the first six steps – congratulations! That was the easy part. This last step is essential, but also the most challenging. From this point on, it's imperative to have faith in your delegation process and people.

CHAPTER 12

TRUST: TRUST BEGETS TRUST

When it comes to trust, I believe one thing to be true: Trust begets trust. And with a virtual assistant, one of the things that you'll find as a leader is that because you can't see people, you'll have to fill that space with trust.

Not fear. Not suspicion. Not micromanagement.

But trust.

Trust and just about every other mission-critical element of your success are mutually inclusive; they simply cannot exist without trust.

What this looks like in application...

I choose to believe in the good intentions of all people; I choose to lead with good intention, knowing that my virtual assistant and I are there to serve one another.

I would even encourage you that you fill the gap with trust even before you feel like someone has earned it.

Sounds crazy, right?

But I know one thing to be true when I extend trust: Melissa doesn't show up to work to fail. She doesn't want to let me down. She doesn't come to work and say, 'You know what? I think I'm not gonna make my goals today and I'm just going to mess everything up.'

Still, it's not if but when a mistake will happen or something goes wonky; it's going to happen.

People are people, and we all make mistakes. When I was a VA, I made plenty – and my leaders were gracious, humble and helpful. And, like all things, we course correct and get better.

Your virtual assistant will fall short of expectations – but so will you. So this requires an honest gut-check.

It looks a little something like this...

- What are you doing to foster a healthy work environment?
- Are you extending trust?
- Are you a micromanager?
- Are you treating adults as adults?
- Are you filling gaps with trust?
- Are you leading in a way where you are asking about something and filling the gap with trust or are you instead being accusatory?

CONCLUSION

Gut-check time: Are you in the way?

Friday night, you were answering emails during your daughter's soccer game.

Saturday morning, you were on a call with a client about a new initiative during your son's piano recital.

Saturday night, you went out to celebrate your anniversary but you were so distracted by intrusive thoughts about work that you can't remember what you ate.

Sunday afternoon, you took time to plan and prepare for the week ahead while your family went for a bike ride.

Sound familiar?

Let's get uncomfortably honest here: How long has it been since you were fully present?

I'll assumptively answer for you: Probably too long. You know how I know? Because I've been there.

And if we're all being really real, we've all been there. Life has a sneaky way of getting in the way of our best intentions: being present, establishing healthy boundaries, self-care, putting family first.

We know what we're supposed to do but often, we just can't quite figure out how to do it.

But as with any struggle or obstacle in life, the first step is admitting you have a problem: You may not have everything under control.

So if you're not delegating to a Virtual Assistant, you're impeding the growth of your team and your organization.

It's time to get out of the way.

Your company has met its success as a result of your hard work, dedication, and leadership.

But have you considered the fact that your solopreneurship mindset may be holding you back?

Every business starts with unstoppable passion and drive for finding the path to success. At some point, you're going to come to a crossroad: You can choose to keep doing it the same way you've always done it, or you can begin entrusting a Virtual Assistant.

Why? Easy – there's only one you! If you want to stay in business, you're going to need to delegate to keep up with the demands your business requires to grow.

Delegation does not have to be tricky or overcomplicated. You are not giving up the heart of your company or creating a weakness by not tending to every little detail. As a matter of fact, the opposite is true. Delegation, when done well, gives you the opportunity to duplicate your efforts and go farther than you ever thought possible while strengthening your company as a whole.

Delegation lightens your load and gives you time to do exactly what only you can do, and more of it!

Let it grow.

Don't be the lid on your organization's growth. If you don't delegate, your organization won't grow. If your team doesn't grow, your organization will stall.

Truthfully, the secret behind every successful business owner is the team that holds them up.

You can't do everything on your own and with a Virtual Assistant, you won't have to!

ABOUT THE AUTHOR

As CEO of BELAY and co-host of the One Next Step Podcast, Tricia considers it her distinct privilege to be able to cast vision for the future of BELAY and empower leaders with a collective knowledge from a decade of helping organizations achieve their vision.

Born and raised in Long Island, she attended the University of Hartford and earned a degree in Business Administration and Management. For ten years, she served as District Manager for the retail chain Pacific Sunwear, however, when her first child was born, she – like many other parents – found herself struggling to balance her high-profile career with her new role as a mother.

Enter: BELAY

Joining a startup during the recession was risky, but she took a leap of faith. As BELAY's first employee and virtual assistant – and then onto serve as Director, Vice President, President, COO, and now CEO – Tricia's spent the last 10 years 'walking the walk' of what BELAY calls the Third Option: the ability to cultivate a balanced life with a successful career while making family and personal relationships a priority.

As a leader, she's passionate about everyone owning and forging their own paths, careers, and professional development, putting each of BELAY's valued employees and contractors in the driver's seat to cultivate the balance of work and life that best suits them.

She's so committed to helping people realize this that, in 2020, she launched a podcast, One Next Step, to show leaders that they can not only grow their

business but also help them create more margin so that they can enjoy their life.

Together with guests and her co-host and BELAY COO, Lisa Zeeveld, they share real-world business knowledge that will help real-life leaders.

And while it's been said that 'time is money,' Tricia couldn't disagree more because unlike money, time is finite so she's passionate about boundaries, saying 'no' and knowing her limits – knowing where she adds value, where she can step aside, and where she needs to show up, both personally and professionally.

Tricia lives in Charlotte, NC with her husband, two daughters, stepson, and fur baby, Lola, and is seriously grateful – for the opportunity to live out her third option every day as a hands-on mom while supporting those she leads to live out theirs.

RESOURCES

[Tricia's Ideal Work Week](#)

[Blank Ideal Work Week](#)

[Delegation Worksheet](#)

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