HOW TO BUY BACK YOUR TIME WITH AN ASSISTANT

Work-tested templates and tactics
to multiply your productivity

By David Hauser

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Part 01

WHY WORKING WITH AN ASSISTANT ISN'T, WELL... WORKING

WE ALL ASPIRE TO GET MORE DONE IN LESS TIME.

We want to focus on our most productive, high-value work.

We read about the importance of working *on* your business instead of *in* your business.

And when you're a busy entrepreneur, freelancer, or executive, the standard advice from productivity experts is that you should outsource some tasks to an assistant. As my friend Dan Martell says, "If you don't hire an assistant, you are one."

And the message is getting across. **Over 1,000 people every month search Google for information about hiring a virtual assistant.**

The problem is, no one teaches you how to get the most out of working with an assistant. It's implied that by hiring an assistant we automatically know how to effectively work with one.

Merely hiring an assistant doesn't solve your business problem. In order to truly buy back your time with an assistant, you need processes and playbooks.

In this guide, I'll share with you what I've learned and built through years of working with virtual assistants. Then you can steal my exact templates to start building a productivity system that fits your lifestyle.

Let's dive in.

THE OPPORTUNITY COST OF INEFFICIENT PROCESSES

What goals do you want to achieve by working with a virtual assistant? How much more could you accomplish if you could delegate some of your responsibilities?

It's important to remember that there's a substantial opportunity cost to performing work that could be accomplished by an assistant.

With the right use of delegation, you can:

1. Spend more of your time performing higher-level work
2. Regain some mental space by not overworking
3. Stop undervaluing your time working on tasks that don't require your unique expertise
4. Regain time with your family
5. Spend more time learning and growing
6. Connect with friends and colleagues
7. Feel free to take breaks and true vacations

Busywork ends precisely where our most high-value work begins. In other words, proper delegation gives time back to you. And time gives you freedom.

But even if you're clear about why you need an assistant, it isn't always easy to decide which tasks to delegate. Here are a few ways to find tasks for your assistant.

Naval Ravikant
Co-founder, chairman and former CEO of AngelList

"If you can outsource something—or not do something—for less than your hourly rate, outsource it or don't do it."

TASKS YOU SHOULD DELEGATE TO A VA

Begin at a high level. In Chris Ducker's book, *Virtual Freedom*, he recommends considering **three categories** as you decide what to delegate to your assistant. Open a Google Doc (or pull out a pen and paper) and begin answering some of these questions for yourself:

Tasks you feel you shouldn't be doing

What tasks make you cringe when you think about performing them?

What tasks are you most prone to procrastinate?

What necessary responsibilities do you want to remove from your calendar?

Tasks you don't know how to do

Could the tasks you're currently doing be completed faster by someone else?

Are there projects you're handling that could be wrapped up in a better, more professional way?

Are you trying to cut costs by dabbling far outside your areas of expertise?

Tasks you don't like doing

Which tasks should you simply never touch - meaning you could eliminate them from your schedule entirely, making way for more important tasks?

Which low level tasks could be easily given to a virtual assistant as part time work?

Which tasks are you handling that could be taken over by a professional who knows exactly what he or she is doing?

Which tasks are stopping you from really focusing on the strategic growth of your business?

Once you've named everything you don't like doing, you can begin categorizing these challenges into tasks you can delegate.

TYPES OF TASKS TO DELEGATE

What types of activities and responsibilities can you delegate to an assistant?

There are many ways to break down the potential tasks for your assistant. The virtual assistant connecting platform, **Delegated**, puts the work into three categories:

Front office

- Scheduling
- Calls
- Marketing
- Client service

Back office

- Recurring (like data entry)
- Documents
- Research
- Strategy

Everything else

- Personal support
- Travel
- Growth

A similar platform, **Zirtual**, suggests also including responsibilities with more expertise. This includes tracking expenses and invoices, social media strategy, marketing, and event planning.

Assistants can work across many industries and professional situations.

- **Entrepreneurs** can use assistants to create reports, schedule meetings, and help you make time for your most valuable work.
- **Freelancers** can use assistants to produce marketing collateral, correspond with clients, and track income and expenses.
- **Influencers** can use assistants to edit and upload content, manage content calendars, and correspond with new sponsors.

And that doesn't even begin to cover the essentials like data entry, tracking daily operations, booking meetings, and research.

No matter how you frame it, this is the idea generation stage of hiring an assistant.
Here are some of the most common responsibilities I've seen people delegate.

Administration

- Manage to-do's
- Data entry
- Email correspondence
- Proofread your writing before it's published or sent
- Track your regular to-do's to create playbooks based on recurring themes
- Basic customer service
- Source graphics and images for blogs
- Manage social media accounts
- Expenses tracking and reporting

Personal

- Hire local service providers
- Negotiate with insurance providers, cable companies, etc.
- Track recurring tasks to remind you to handle them before they're due (like registering cars, paying annual bills)
- Perform price research to help you find the best deal
- Research vendor quotes
- Inbox management

Scheduling

- Manage personal and professional calendars
- Reschedule meetings when things fall through
- Book travel
- Update calendar regularly
- Set reminders for important upcoming events
- Help plan and organize upcoming events
- Manage invites and guest lists
- Create a publishing calendar for social media

Research & planning

- Research travel options
- Research and outline articles or social media content
- Plan events, including ordering catering and sending invites
- Manage and compile information about your business or products
- Compile contact lists for pitching or competitive analysis

But naming tasks isn't enough to buy your time back with an assistant. When we first start working with a VA, many of us get stuck in the same cycles we were trying to escape.

Catherine Floyd
David's assistant

What are the most common mistakes people make when working with a virtual assistant?

"A few common mistakes are a lack of communication, not giving us the tools and information we need, and expecting us to already know what they want and how to deliver that.

When someone hires an employee, there's a training period. But most clients don't feel like they have to train their virtual assistant — but it doesn't work like that. Yes, I have seven or eight other clients and know how to do my job. But I don't have a client that owns your same business or has your same family."

MISCONCEPTIONS ABOUT WORKING WITH A VIRTUAL ASSISTANT

Not everyone who works with an assistant achieves more productivity. Why is that?

First, I'll tell you a few common — and I believe wrong — ideas about why things aren't quite clicking into place with your virtual assistant.

Misconception #1

"I hired the wrong assistant."

Reality: In most cases, the person you hire matters less than the process you put in place.

Misconception #2

"It's faster for me to finish the task than to explain it."

Reality: Long term it is more efficient to invest in communication early on, including writing things down, so that you can reap more freedom later.

Misconception #3

"I can't trust anyone to do this work except myself."

Reality: Trust is earned over time. Start by delegating the lowest-risk tasks, then scale up.

Misconception #4

"My assistant must constantly ping me questions to stay productive."

Reality: You can build playbooks that minimize interaction by answering questions before they're asked.

In other words, all of these common challenges are only symptoms of a larger problem looming below the surface.

Adam Hergenrother
Founder & CEO of Adam Hergenrother Companies

"There will come a time for all entrepreneurs when no matter how awesome you are, you will simply no longer be able to do it all on your own.

No one succeeds alone and it's a hell of a lot more fun when you have other people to solve problems, dream big, make mistakes, and make history with. Enter the assistant."

In my experience, the more foundational problem is...

EVERYONE'S WINGING IT

How much more could you get done in a day if you could create a carbon copy of yourself?

I'm sure Elon Musk is secretly working on this technology in a lab somewhere, but that's beside the point.

You would be at least twice as productive if there were two of you, right?

That's what it can be like to work with an assistant when you have the right process and communication plan in place. Here's the difference between what most people do (wing it) and the alternative way that we'll discuss for the remainder of this guide (playbook-driven).

Winging it

- ✕ Never have time to outsource tasks
- ✕ Your attention is required for a VA's productivity
- ✕ Limited to virtual tasks
- ✕ Everything falls apart during vacation
- ✕ Constantly send reminders for recurring tasks

Playbook-driven

- ✓ Seamless communication
- ✓ VA hardly needs to speak with you
- ✓ Handles virtual and in-person tasks
- ✓ Vacations strengthen the processes
- ✓ Always ahead of tasks and responsibilities

In part two, we'll cover how to handle communication between you and your assistant.

Spoiler alert: it all comes down to just three factors: how you communicate basic information, assign one-off tasks, and delegate recurring responsibilities.

Part 02

THERE'S A ~~APP~~ PLAYBOOK FOR THAT

INVEST FOR THE LONG-TERM.

Documentation is a path to freedom. When many people start working with an assistant, it can feel like telling someone how to do something requires more effort than doing the task yourself. But if you want to buy your time back with an assistant, you need to get over that feeling. All of this requires an upfront investment of attention to bring your future freedom to life.

What I'm saying is, if you want to get the most out of working with an assistant, you need to plan ahead. Expect a few weeks of heavily involved onboarding. In this time, you're creating the documents and setting in place the processes that will govern your business for years into the future.

Things will get easier and communication will be improved through time. But the investment never truly ends. Training is a never-ending process.

YOUR FOUNDATION FOR PRODUCTIVITY: THE DOSSIER

One of the biggest hurdles people face when working with a virtual assistant is communication. Specifically, the assistant constantly needs basic information from you throughout the day, but you're too busy to respond to them... so everything stalls until you have time to reply.

At best, you become a communication obstacle that slows everything down. At worst, your assistant's productivity hinges on your responsiveness and daily availability.

Either way, stalled communication is a big problem.

Your solution is creating a dossier.

What is a dossier?

The dossier is a foundational document containing the most common information an assistant needs to know about you, your family, and business. It's a well-organized list of your most important information, the stuff that's top-of-mind for you but that no one else knows.

This includes names of people (and their relation to you) and facts about you (like the university you attended, mailing address, and important dates).

The dossier is your second brain.

DOSSIER EXAMPLE AND TEMPLATE

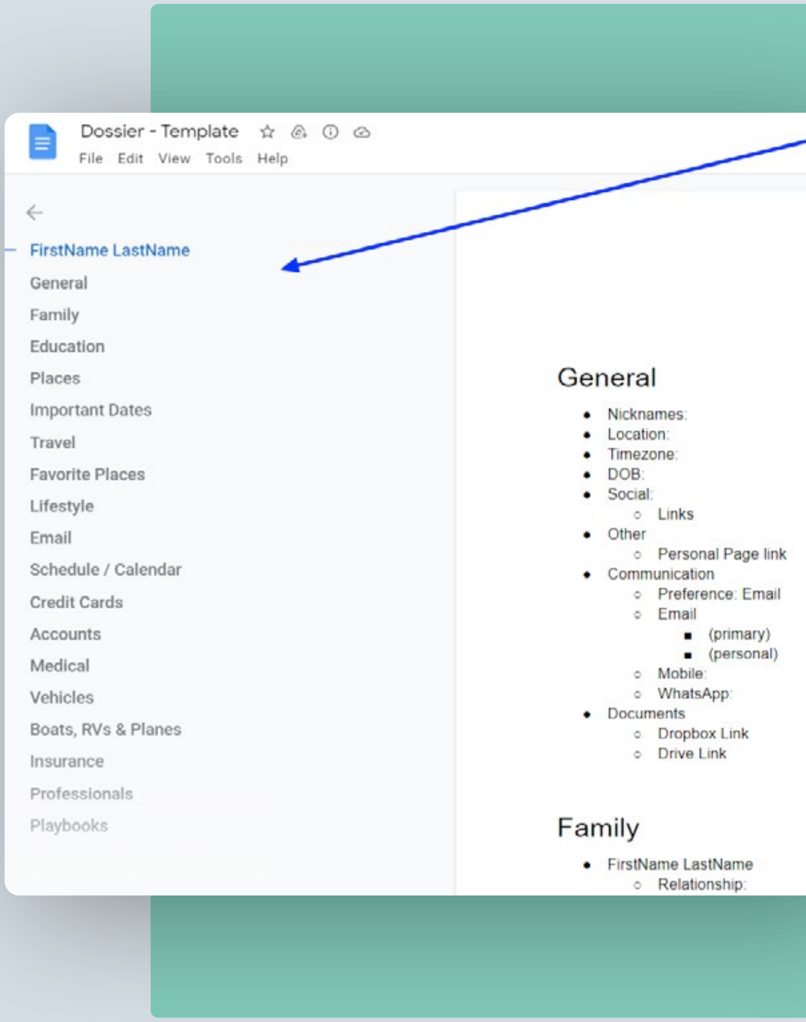
Think of the dossier as a helpful starting point for working productively with your assistant. It's the **base and structure** for everything else you do. A dossier answers every common question that an assistant may need to know about you, empowering them to be productive without constantly asking you for information about you or your business.

Once you've filled out your own dossier, you'll need a process for quickly (and efficiently) assigning one-off tasks.

Here are some examples of what to include in a dossier:

- **General information** (nicknames, time zone, date of birth, social media links etc.)
- **Family**
- **Education** (where your children attend school)
- **Places** (your home address, vacation homes, etc.)
- **Travel** (preferences about hotels, airlines, and AirBnbs)
- **Calendar** (timezone, primary calendar, other calendars)
- **Medical** (insurance, preferred hospital, doctor, dentist)

Allergies, dietary preferences, insurance information... You get the picture. Take my dossier template and start filling it in with your own information. **This will save you and your assistant a lot of time going forward.**



[Get it here →]

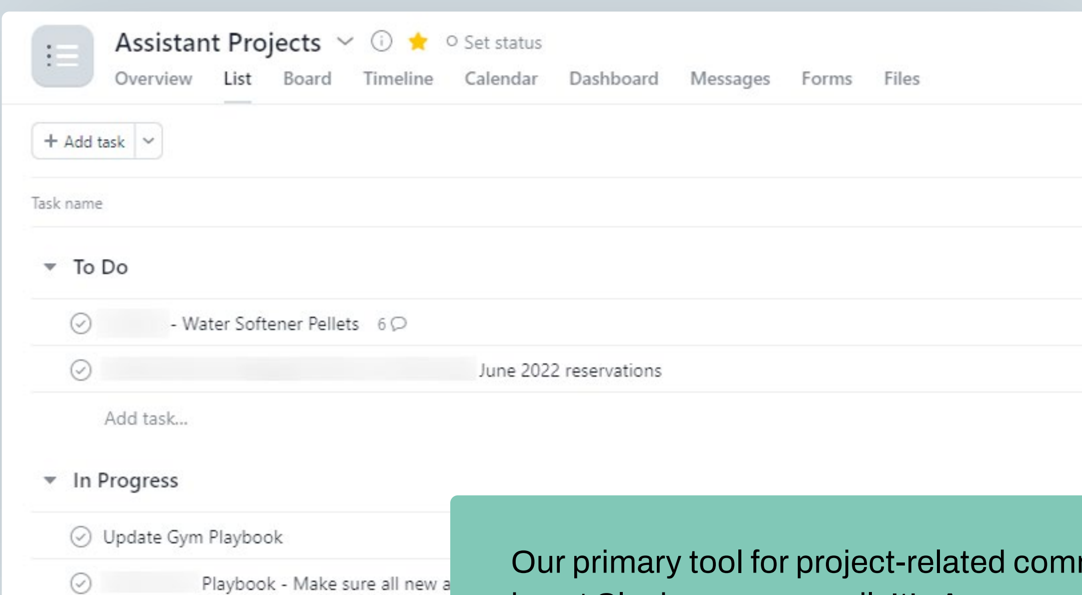
FOR ONE-OFF TASKS: A PROJECT MANAGEMENT TOOL (NOT EMAIL!)

According to most productivity gurus, I do everything wrong when it comes to email.

The first thing I do in the morning is to check my inbox. And every day I commit the cardinal sin of reading and responding to emails from bed. I also check it frequently throughout the day so I can respond to people quickly.

Unlike most people, I don't look at my relationship to email through the lens of restrictions. It's one of the best multi-tasking tools available. Think of how much more you can accomplish with an hour of email as opposed to an hour of calls. **The problem is, most people use their inbox to perform tasks that are meant for other tools.**

Never use email to do a calendar's job. Likewise, don't project manage using email. And perhaps most importantly, don't make your inbox your to-do list. There are better tools for that.

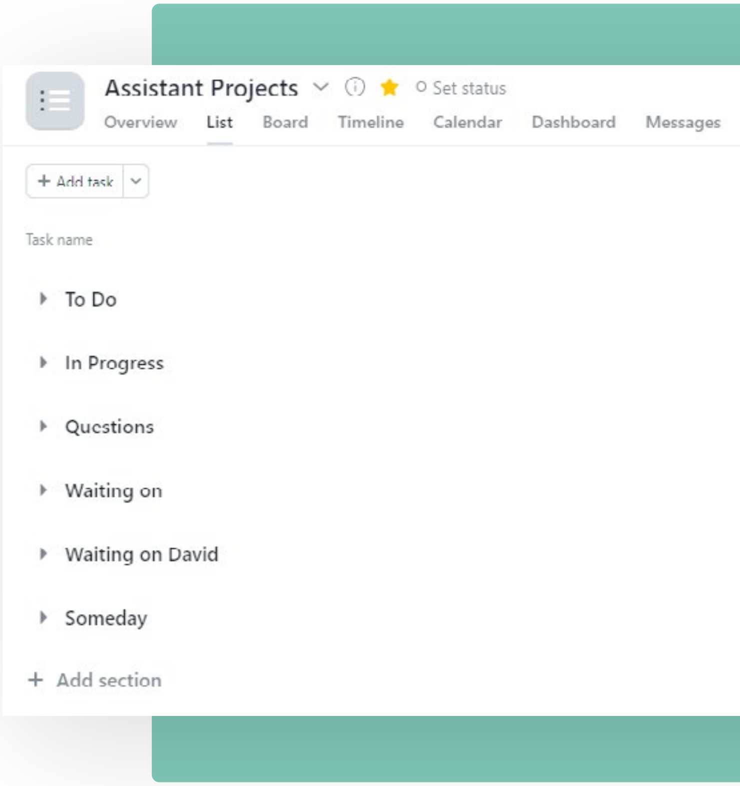


Our primary tool for project-related communication is not Slack or even email. It's Asana.

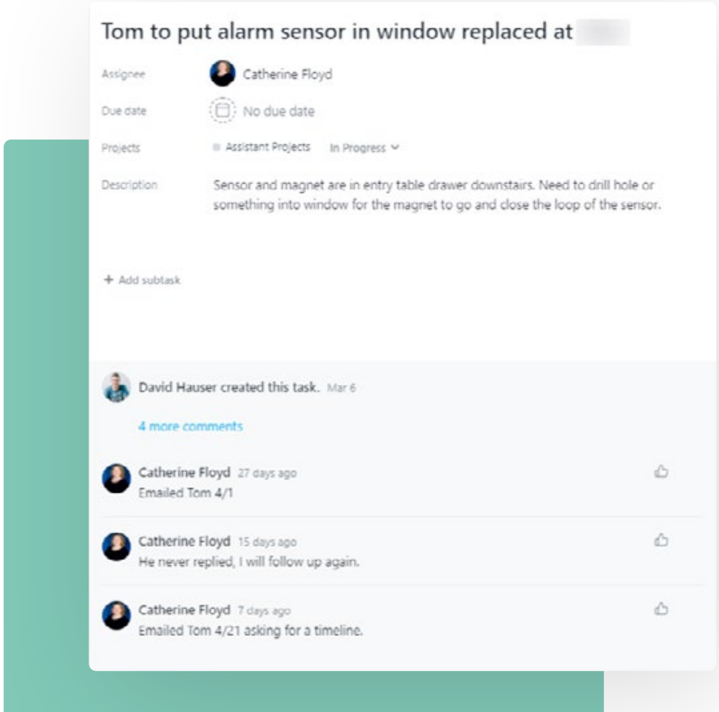
As I come up with one-off tasks for my assistant Catherine, I don't email her. I drop new tasks into Asana. We've organized Asana into several categories that let both of us know the progress of a certain task.

This is how I structure project management tasks:

- **To-Do** is where Catherine pulls new tasks, in priority order
- **In Progress** is a list of the projects she's working on
- **Questions** include anything Catherine might have otherwise asked me via email, any questions related to a current task
- **Waiting on** means waiting on a vendor
- **Waiting on David** means something is waiting on David to respond or decide
- **Someday** includes ideas that I want to get out of my head that we may use in the future



Tracking tasks in a project management tool means email is reserved for true correspondence. When I need an update about a particular task, I log into Asana instead of opening my inbox.



How to write a task

When you or your assistant comes up with a new task, you can drop it into Asana using a title that captures the primary description of what must be accomplished. Greater details about the task are included in the description area. Questions and updates can also be written in the comments section.

As your assistant completes tasks, they can drag and drop those tasks to the next row or column in Asana until the task is completed.

EXAMPLE: TASK COMPLETION IN ACTION

Let's pretend I need landscaping done at my home. I might drop the new task into Asana as the following: "Replace tree at primary house - lower level by beach"

Notice I'm writing shorthand. Catherine can search our playbook (more on this in a moment!) for the house I'm referencing, find our preferred landscape professional with their contact information, provide them information about timing and my address, and book the appointment without any interaction with me.

As the task goes through different stages of completion, Catherine moves the item to different categories in Asana. Additional updates are placed in the comments. This allows me to check in about individual tasks, and helps Catherine remember all her open projects.

And best of all, the assignment gets accomplished... and **all I had to do was drop nine words into a project management tool.**

But what about recurring tasks? Or what if your assistant doesn't have all the right information? That's where **playbooks** come in.

Dan Martell
Serial entrepreneur

"Most people who have virtual assistants use them for scheduling, research, et cetera. But assistants are capable of so much more.

They take things off your plate so you can really focus on your business. They are critical for helping you get more done in your day."

FOR RECURRING RESPONSIBILITIES: PLAYBOOKS

Playbooks are a collection of categorized, living documents that you share with a virtual assistant. Creating a playbook doesn't require learning a new tool. Our playbooks are just Google Docs organized in clearly labeled Google Folders.

These documents contain all the information your assistant could ever need to know about you, your business, and the numerous responsibilities you're trying to get done.

The purpose of a playbook is to streamline communication and create a repeatable process that tells your assistant exactly what you need, and how you'd like that task completed. Instead of sending dozens of messages back and forth throughout the day to complete tasks, a virtual assistant has answers to all the information they need to do their best work.

It's like a collection of expanded, task-focused dossiers.

If a dossier is a collection of the basic information about you, then playbooks are documents that contain step-by-step instructions for completing specific recurring tasks.

Documentation is a communication shortcut. Playbooks make it easy for you to assign ongoing and repeating tasks without having to break down every detail, every time.

Catherine Floyd
David's assistant

"Start with organization and a good flow. Google Docs lets you view titles in a table of contents on the left sidebar. It's easy to skip to different categories: medical, places, calendars, etc. That way, I don't have to scroll endless pages. If I need medical information, I can just click on the medical header and skip straight to the section.

Beneath each heading I can list subtopics. Under medical, I'll list everyone in the family and list their doctors, dentists.

You have to organize it from day one. It's too much work to change it all later. I'll create categories before I know the information that will eventually be in them, just so I have the right headers and flow from day one."

HOW TO STRUCTURE AND ORGANIZE YOUR PLAYBOOKS

Playbooks come in multiple forms. Most will fit into one of three categories:

- **Places -** This list includes everything your assistant could ever need to know about your home, office, or any other location. It answers questions like: Who are your preferred local service providers? How often is the lawn mowed? It contains gate codes, addresses, and phone numbers to every vendor you regularly work with. All these details are included in playbooks for each location.

- **Common tasks & processes -** From flights to haircuts, we use these playbooks to stay ahead of recurring actions. The documents provide clear details about my preferences: how often something like a haircut should be scheduled (and where). It also answers if-this-then-that situations like your preferred process for booking a flight.

- **Items -** This usually involves large items like vehicles. These playbooks contain information about the vehicle itself (make, model, year, etc.), where I prefer to get it serviced, and when to get an oil change.

I like to keep things simple. All your playbooks should be stored in a basic Google Folder, so that everything is easy to view, scroll, and search.

Having all your playbooks in one folder also makes it easy for you or your assistant to create new playbooks ongoingly, without overwhelming anyone or losing information in the process.

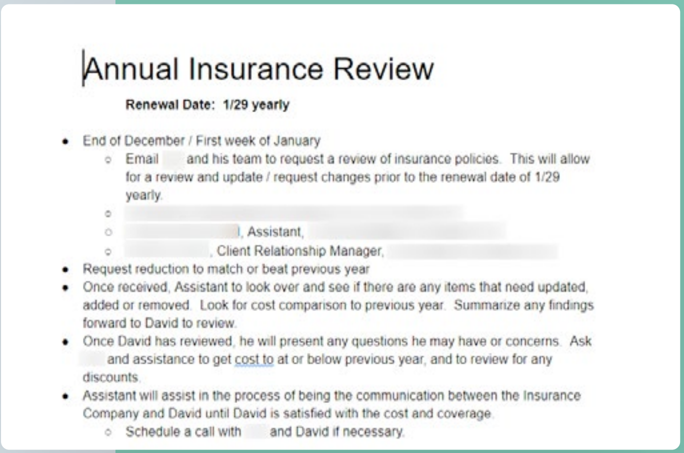
Individual playbooks do not have to be long. In fact, most of them will be very short because our goal is efficiency. One of the keys to creating an effective playbook is brevity. There's no need for extraneous detail — just stick to the facts and preferences.

PLAYBOOKS IN ACTION

Let's consider an example.

One of my playbooks, titled ECM - EarthClassMail, includes instructions for processing my physical mail, since that's a recurring task I choose to delegate.

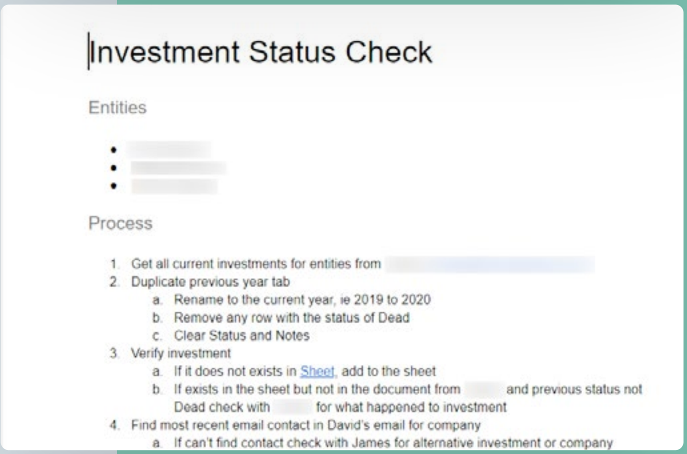
In my ECM playbook, I break down what someone should do with certain priority mail, when to simply throw something away (like junk mail), and who to contact regarding bills, among other instructions.



Annual Insurance Review

Renewal Date: 1/29 yearly

- End of December / First week of January
  - Email and his team to request a review of insurance policies. This will allow for a review and update / request changes prior to the renewal date of 1/29 yearly.
  -
  - , Assistant,
  - , Client Relationship Manager,
- Request reduction to match or beat previous year
- Once received, Assistant to look over and see if there are any items that need updated, added or removed. Look for cost comparison to previous year. Summarize any findings forward to David to review.
- Once David has reviewed, he will present any questions he may have or concerns. Ask and assistance to get cost to at or below previous year, and to review for any discounts.
- Assistant will assist in the process of being the communication between the Insurance Company and David until David is satisfied with the cost and coverage.
  - Schedule a call with and David if necessary.



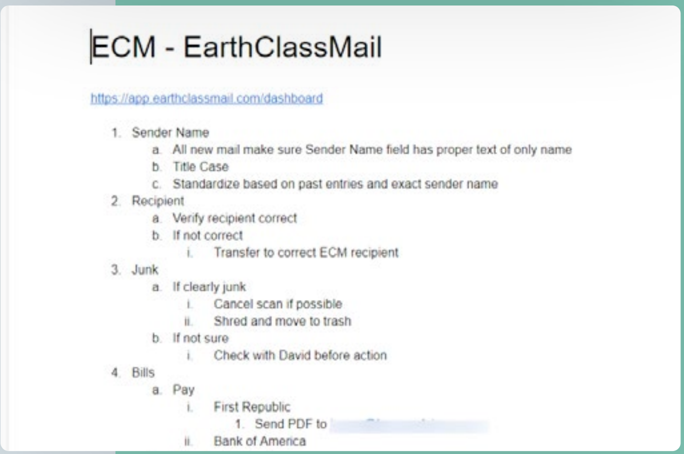
Investment Status Check

Entities

-
-
-

Process

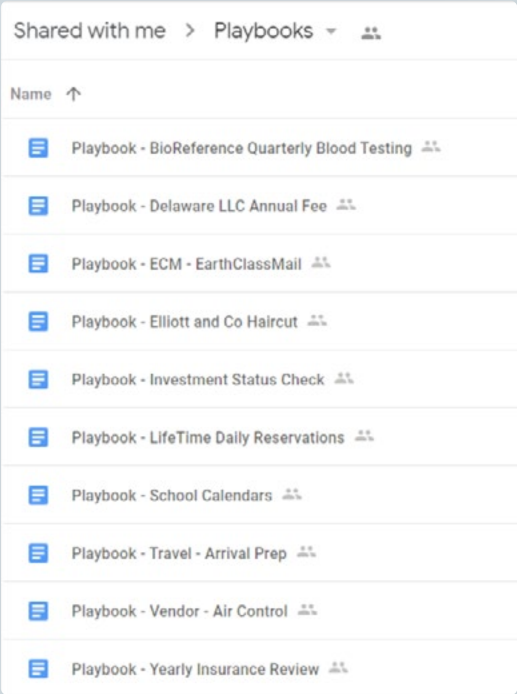
1. Get all current investments for entities from
2. Duplicate previous year tab
   a. Rename to the current year, ie 2019 to 2020
   b. Remove any row with the status of Dead
   c. Clear Status and Notes
3. Verify investment
   a. If it does not exists in Sheet, add to the sheet
   b. If exists in the sheet but not in the document from and previous status not Dead check with for what happened to investment
4. Find most recent email contact in David's email for company
   a. If can't find contact check with James for alternative investment or company



ECM - EarthClassMail

https://app.earthclassmail.com/dashboard

1. Sender Name
   a. All new mail make sure Sender Name field has proper text of only name
   b. Title Case
   c. Standardize based on past entries and exact sender name
2. Recipient
   a. Verify recipient correct
   b. If not correct
      i. Transfer to correct ECM recipient
3. Junk
   a. If clearly junk
      i. Cancel scan if possible
      ii. Shred and move to trash
   b. If not sure
      i. Check with David before action
4. Bills
   a. Pay
      i. First Republic
         1. Send PDF to
      ii. Bank of America



Shared with me > Playbooks

Name ↑
Playbook - BioReference Quarterly Blood Testing
Playbook - Delaware LLC Annual Fee
Playbook - ECM - EarthClassMail
Playbook - Elliott and Co Haircut
Playbook - Investment Status Check
Playbook - LifeTime Daily Reservations
Playbook - School Calendars
Playbook - Travel - Arrival Prep
Playbook - Vendor - Air Control
Playbook - Yearly Insurance Review

Catherine Floyd
David's assistant

"A playbook lets you compile all of the information in order to follow a process. So with clients like David, his playbooks contain places, phone numbers, addresses — so much information that I don't really need him at all."

AN EASY STARTING PLACE: FREQUENCY-BASED PLAYBOOKS

So which playbook should you create first?

I've found that the easiest place to start is annual playbooks. These are the recurring tasks that only happen once per year. Your annual playbook will list when these tasks are due, who needs to be contacted to complete them, and so on.

One example is school calendars for my children. Once per year, when my children's calendars are released from school, I have my assistant upload all the important dates into individual calendars that link to mine. The playbook details which calendar the information goes on, as well as details about formatting. When they have days off or special events, those appear on my calendar so that I can prepare for them far in advance.

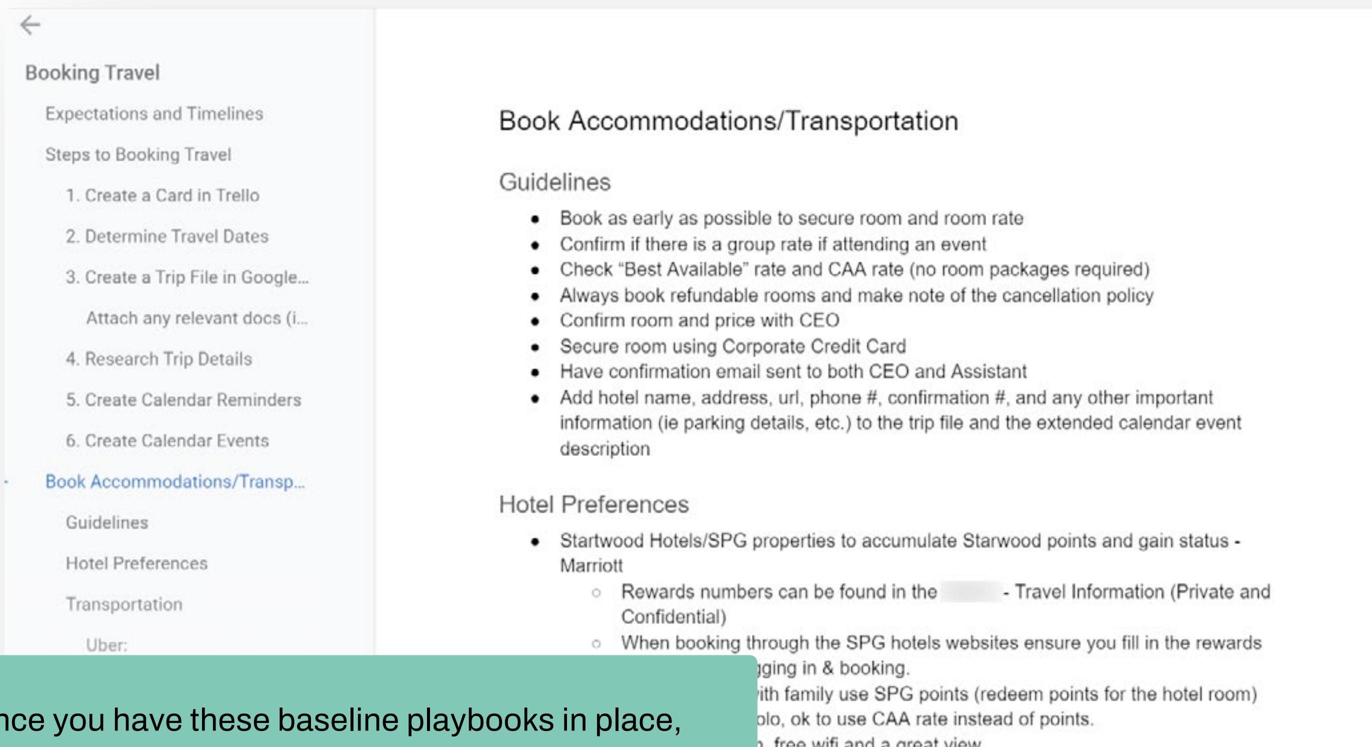
This annual playbook can include health checkups, reminders to renew the car registration, or to pay (or cancel) certain annual subscriptions. I have to collect investment status for the companies I've invested in. Every year I want to get an insurance review from my liability insurance, which means emailing them to request a breakdown comparison of last year versus this one. Each of these tasks appear in the annual playbook.

Once you have an annual playbook, you can move onto the next time period down: quarterly, monthly, weekly, and daily. The goal is to create playbooks based on how often certain activities need to be performed. Your assistant can reference these time-based playbooks regularly and add special dates to the calendar so no important recurring tasks get overlooked.

OTHER COMMON PLAYBOOKS

There are dozens of potential playbooks you can create. Once you've nailed down the time-based playbooks, you can move into creating playbooks that are needed spontaneously. Here are just a handful you might create:

- Travel
- Vehicles
- Houses
- Medical
- Calendar
- Email
- Mail
- Finances
- Preferred vendors
- Social media



Once you have these baseline playbooks in place, it's helpful to schedule a recurring meeting with your assistant — perhaps quarterly or monthly — to discuss what is and isn't working.

Catherine Floyd
David's assistant

"I barely have to ask David anything. We've worked together over a year, but I don't ever have face-to-face conversations with him. But I feel like we have a good working relationship because I understand what he needs me to do and together we've created playbooks that set both of us up for success."

SCHEDULE CHECK-IN MEETINGS WITH YOUR ASSISTANT TO COME UP WITH NEW PLAYBOOKS

This is an area where I could improve. I believe in regular check-ins but don't schedule them as often as I should. In an ideal situation, you would meet regularly with your virtual assistant to discuss how successfully each playbook or process is working. There may be key information that's missing from a particular playbook. Check-ins allow you to easily fill in the information gaps.

Instead of meetings, I'll ask Catherine via email if there are additional playbooks we need to create. Every playbook evolves over time. You'll constantly optimize your current playbooks with more details or clarity.

Better playbooks make life easier for both you and your assistant. You both want to be better at what you're doing. Regular check-ins allow you to get on the same page.

This is also an opportunity to create playbooks on the fly. If you don't have time to write a playbook from scratch, talk it out. You can talk over Zoom or create Loom videos to show how a task is done. Your assistant can turn the video into a written playbook.

TEST, ITERATE, AND EVOLVE YOUR PLAYBOOKS

Once you've built a foundation, both you and your assistant can continue to add new information as you uncover new opportunities to streamline tasks.

As I said early, a playbook is a living document. It evolves as you learn more about how you work. New elements are added as you notice the recurring tasks in your life that can be outsourced.

The easy things to capture are repeatable tasks: biweekly meetings, a monthly haircut, etc. It's more challenging to capture the habits or tasks you're performing regularly without noticing. **Ask your assistant:** "What are the things I ask you to do all the time that we don't have a playbook for?"

The task of building new playbooks might become something you look forward to. After all, the more your efficiency goes up, the more playbooks you want to create.

For example, soon I'm going to create an "Important Dates" playbook. This will highlight anniversaries, birthdays, you name it. Within the playbook, I might include my favorite vendors for flowers or chocolates. It'll instruct my virtual assistant to order them seven days in advance for delivery on a particular day.

DOSSIER, ASANA, PLAYBOOKS: THEY ALL TIE TOGETHER

Your dossier, project management tool, and playbooks overlap to create a single, powerful productivity system.

Your assistant uses playbooks ongoingly to stay ahead of recurring responsibilities. They receive new tasks from you through a project management tool (and occasionally create new playbooks when tasks become repetitive). And every time your assistant needs additional information to complete a task, they simply reference your dossier.

Incorporate just these three items into your productivity systems and you're already miles ahead of most people who work with virtual assistants. But wait, there's more...

In part 3, we'll discuss additional tactics for hiring and working more effectively with your virtual assistant.

Part 03

HOW TO WORK EFFECTIVELY WITH A VIRTUAL ASSISTANT

DON'T WAIT FOR "THE ONE"

Now we face the chicken-and-egg question. Do you look for the best virtual assistant first or build the process and playbooks first?

I think people spend too much time thinking about finding "The One" when it comes to hiring a virtual assistant. In all honesty, developing a set of playbooks is more important than investing time to find the perfect match. Yes, who you hire is important. But the purpose of playbooks is to clarify tasks and processes so thoroughly that you can outsource it to anyone.

Too many people are stalled by the hiring process. To get the ball rolling, it might even be best to outsource to a company that provides assistants (the "Outsourced" section from the next point).

It's easier sometimes to just get someone — anyone — for a few hours to kickstart the process. It doesn't have to be the person you work with forever. Just start. Making a hire will incentivize you to quickly create playbooks and processes so that the new assistant is productive as soon as possible.

Once you have the right playbooks in place, you can begin your hunt for the optimal virtual assistant.

3 METHODS FOR HIRING A VIRTUAL ASSISTANT

There are three primary ways to hire a virtual assistant. Here's what you should know:

Outsourced ($30-60/h)

There are services like Zirtual, Delegated, and Time that help you easily connect with virtual assistants. This is the fastest and easiest way to get started. Using these services, you'll pay a higher price per hour. But for the added cost you'll get screened assistants who are ready to go. You can find both fractional and full-time assistants this way.

The downside of outsourced assistants is that it's harder to find executive- and higher-level assistants on these platforms, but it's still possible.

Hire directly ($15-80/h)

You can also hire directly. This is usually done through standard job boards and remote-work job boards like remote.co and weworkremotely.com.

Offshore ($2-20/h)

If your priority is affordability, there are offshoring websites like Upwork that will allow you to browse assistant profiles and reach out to people directly for hire. You can also post a job and consider responses from anyone who bids on your job.

Marshall Haas
Founder of Shepherd

"The big thing that made it work for me after many failed attempts: access!

Give access to as much as possible, including meetings where tasks will be dreamt up. If you're having to spend a bunch of time typing up notes to then delegate to your assistant, it kills the benefit. Having them looped in from the start saves so much 'delegate & transfer' time."

THE STAIR-STEP APPROACH TO DELEGATING

Even armed with a robust folder of virtual assistant playbooks, many people struggle to overcome the trust factor of outsourcing work. Where do you even start?

There is a spectrum from relative ease to real difficulty when it comes to outsourcing your life to a virtual assistant. There are inherent trust barriers that need to be crossed in order for you to truly buy back your time.

For me, transitioning my tasks to an assistant happened gradually. I started with things that felt easy to me, like outsourcing home maintenance. I recommend outsourcing tasks in a stair-step fashion, beginning with the easiest — and the least scary — tasks first.

This is far from a comprehensive list. But here are three levels of responsibility that span the trust spectrum from easy to hard.

First step:
Home tasks

Another word for this is maintenance or chores. Share a playbook containing the contact information for your preferred local maintenance company. Then assign tasks like fixing the fridge or switching lawn care companies. Home tasks tend to feel less risky than, say, giving someone else managing access to your schedule. Once you get used to delegating home tasks, you can move to another easy step, like delegating email.

At first, email doesn't sound like an easy step. But giving your assistant access to your email isn't intimidating unless they are expected to respond on your behalf to important emails — which I don't suggest.

Catherine doesn't respond as me but can jump into my email quickly if I need her to tell someone I'm running a few minutes late for a meeting, for example. Your VA can also manage your inbox to keep you unsubscribed from companies you don't care about.

Second step:
Complex tasks that require decisions

This is where assistants truly become your second brain. As your assistant gets used to your playbooks and understands how you handle certain decisions, you can begin to outsource more complex tasks.

If an assistant understands your criteria for consulting work, for example, they can help you vet potential clients. As strong leads inquire on your website, your assistant can let you know. Meanwhile, your assistant can politely turn down leads who aren't a strong fit so that you don't have to spend time vetting every new inquiry.

Final step:
Scheduling

Maybe this isn't everyone's scariest step, but it was certainly mine. My life runs on my calendar, which makes it scary — as well as super important — to outsource. We have a playbook for this as well. Catherine knows what times of day I'm open to meetings. She now schedules things for me on a regular basis, everything from yoga to flights.

Scheduling is one of the most intimate decisions anyone can make on your behalf. And that's why having a clear playbook with all your calendar preferences is vital to outsourcing scheduling.

Catherine Floyd
David's assistant

"If a client will allow it, I create playbooks for them because they're very effective. And the clients almost always love it. If they're not interested, I still do it and keep it for myself because I can do my job better when I have all of the necessary information in front of me."

VIRTUAL ASSISTANT, LOCAL HELP

When I first worked with a virtual assistant, I tried to use them like an in-person assistant. I tried giving them one-off projects and it didn't work because the communication and processes weren't in place.

The funny thing is, a lot of things I assign Catherine today are in-person tasks. But instead of expecting her to perform them, we have a playbook containing my favorite local vendors. If we don't have a preferred vendor, Catherine uses TaskRabbit to find the right local expertise.

In other words, a virtual assistant can help you achieve local, in-person tasks.

HOW TO REALLY KNOW YOUR PLAYBOOKS ARE WORKING: THE VACATION FILTER

When we were first starting our company, going on vacation was the scariest thing ever. I thought: I can't go on vacation. People need me, right?

I created this false narrative in my head that I was always needed. And if that was true, it was only because I hadn't yet taken the time to create good documentation. Without playbooks and processes, you fall into a vicious cycle where you can never take a vacation because too much feels at stake.

So the vacation filter is your playbook test. Can you — or your assistant — take a vacation without things changing? If so, you've created successful playbooks that can keep your life and business running, even when you're not there to manage them.

The vacation filter has two parts:

- **Your vacation:** If I take a vacation, does Catherine have the tools and information she needs to keep everything moving forward?
- **Their vacation:** If Catherine takes a vacation, are the playbooks thorough and clear enough that she can hand them off to another virtual assistant without anything being dropped?

Dan Martell
Serial entrepreneur

"E.H.R is your effective hourly rate. Essentially, what are you worth per hour? Take your annual salary and divide it by the number of hours you work. What is your number?

Let's say you do the math and it comes out to $25 per hour. If you delegate all the tasks that pay you half of that rate, that's money well spent to get leverage in your business.

The cool thing is, as you delegate and spend more time working on higher value items and your business grows, your effective hourly rate goes up."

FINAL NOTE: PERFORM YOUR MOST VALUABLE WORK

(AND ACHIEVE GREATER PERSONAL FREEDOM)

I want to make a distinction between work that is important versus most valuable. The work that an assistant performs is important, but it's not your most valuable work, which is why these tasks are delegated to them. Delegation gives you the freedom to spend time with your kids, focus on your health, invest in activities that you love, and perform your most valuable work.

It may be important for a writer to schedule meetings. **But their most valuable work is writing**. It may be important for an entrepreneur to change the air filters in their house. **But their most valuable work is leading their startup.**

With the right playbooks and processes, a virtual assistant will perform important tasks for you, so that you have time to invest in your most valuable work.

Find the best and highest use of your time. Then try to outsource everything that doesn't fit into that small category.

Good luck!

Part 04

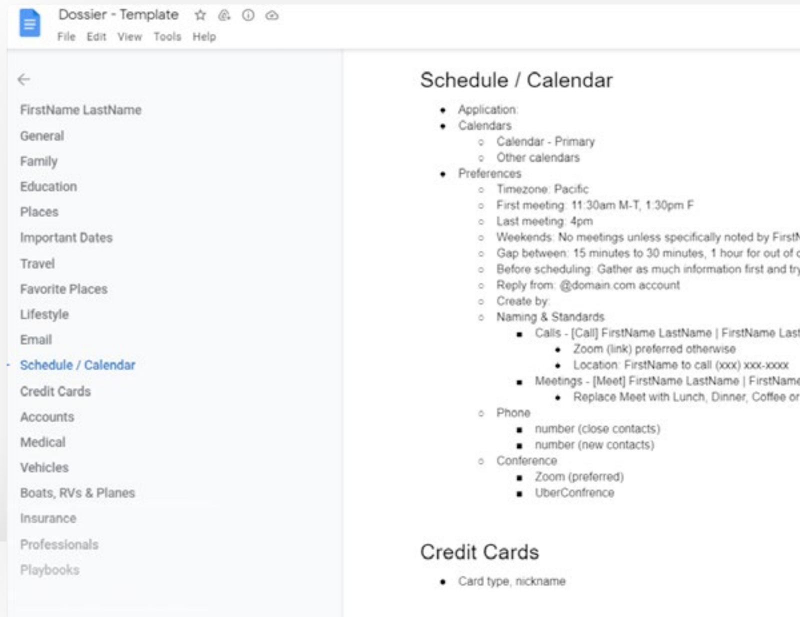
TEMPLATES AND ADDITIONAL RESOURCES

PLAYBOOK TEMPLATES

These playbook templates are based on the ones Catherine and I have crafted for ourselves.

They're the ideal starting pack I wish I'd had from day one.

Open the free folder here →


Dossier - Template
File Edit View Tools Help

FirstName LastName
General
Family
Education
Places
Important Dates
Travel
Favorite Places
Lifestyle
Email
Schedule / Calendar
Credit Cards
Accounts
Medical
Vehicles
Boats, RVs & Planes
Insurance
Professionals
Playbooks

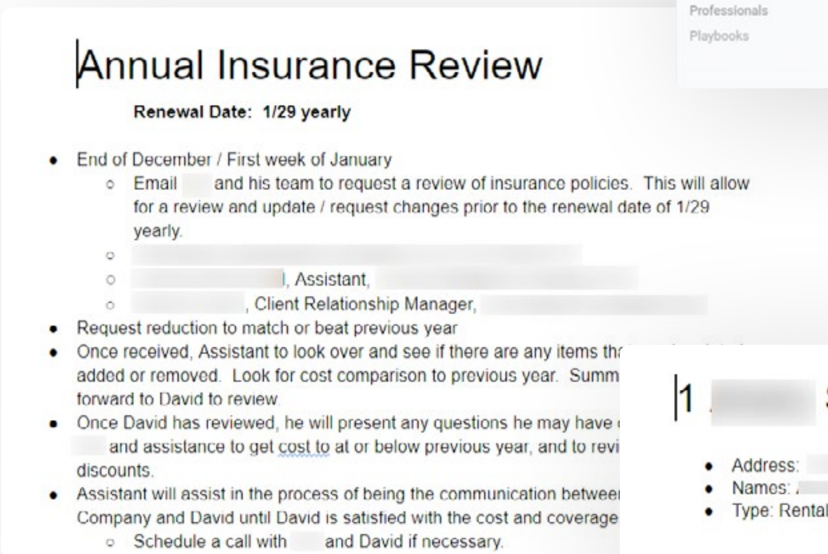
Schedule / Calendar

- Application:
- Calendars
  - Calendar - Primary
  - Other calendars
- Preferences
  - Timezone: Pacific
  - First meeting: 11:30am M-T, 1:30pm F
  - Last meeting: 4pm
  - Weekends: No meetings unless specifically noted by First
  - Gap between: 15 minutes to 30 minutes, 1 hour for out of
  - Before scheduling: Gather as much information first and try
  - Reply from: @domain.com account
  - Create by:
  - Naming & Standards
    - Calls - [Call] FirstName LastName | FirstName Last
      - Zoom (link) preferred otherwise
      - Location: FirstName to call (xxx) xxx-xxxx
    - Meetings - [Meet] FirstName LastName | FirstName
      - Replace Meet with Lunch, Dinner, Coffee or
  - Phone
    - number (close contacts)
    - number (new contacts)
  - Conference
    - Zoom (preferred)
    - UberConfrence

Credit Cards

- Card type, nickname

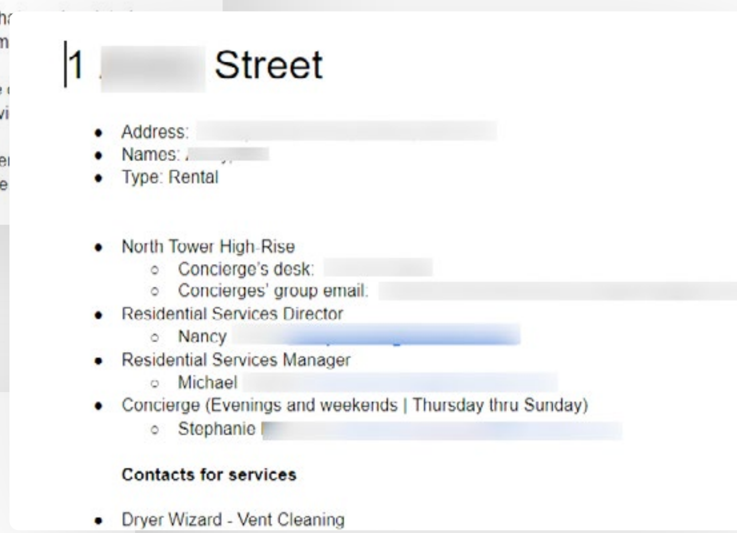
Dossier playbook template


Annual Insurance Review

Renewal Date: 1/29 yearly

- End of December / First week of January
  - Email and his team to request a review of insurance policies. This will allow for a review and update / request changes prior to the renewal date of 1/29 yearly.
  -
  - , Assistant,
  - , Client Relationship Manager,
- Request reduction to match or beat previous year
- Once received, Assistant to look over and see if there are any items th added or removed. Look for cost comparison to previous year. Summ forward to David to review
- Once David has reviewed, he will present any questions he may have and assistance to get cost to at or below previous year, and to revi discounts.
- Assistant will assist in the process of being the communication betwee Company and David until David is satisfied with the cost and coverage
  - Schedule a call with and David if necessary.

Annual Insurance Review playbook


1 Street

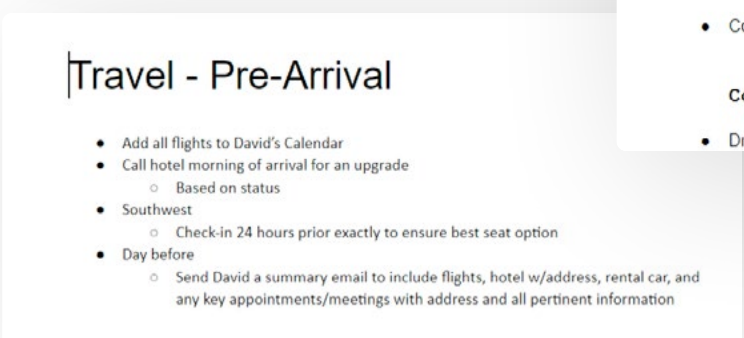
- Address:
- Names:
- Type: Rental

- North Tower High-Rise
  - Concierge's desk:
  - Concierges' group email:
- Residential Services Director
  - Nancy
- Residential Services Manager
  - Michael
- Concierge (Evenings and weekends | Thursday thru Sunday)
  - Stephanie

Contacts for services

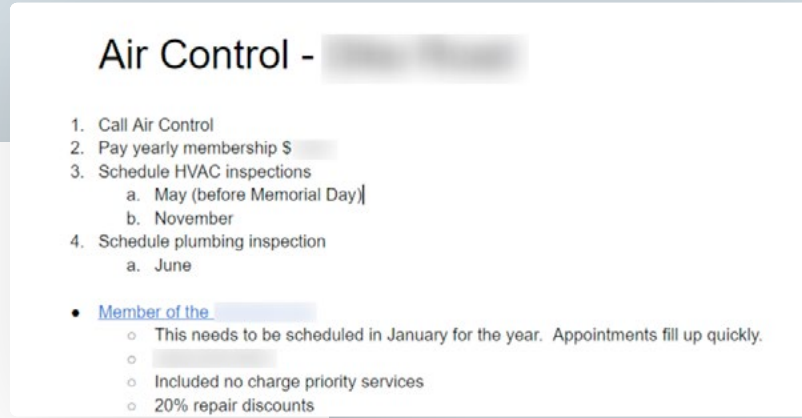
- Dryer Wizard - Vent Cleaning

Places playbook


Travel - Pre-Arrival

- Add all flights to David's Calendar
- Call hotel morning of arrival for an upgrade
  - Based on status
- Southwest
  - Check-in 24 hours prior exactly to ensure best seat option
- Day before
  - Send David a summary email to include flights, hotel w/address, rental car, and any key appointments/meetings with address and all pertinent information

Travel playbook example

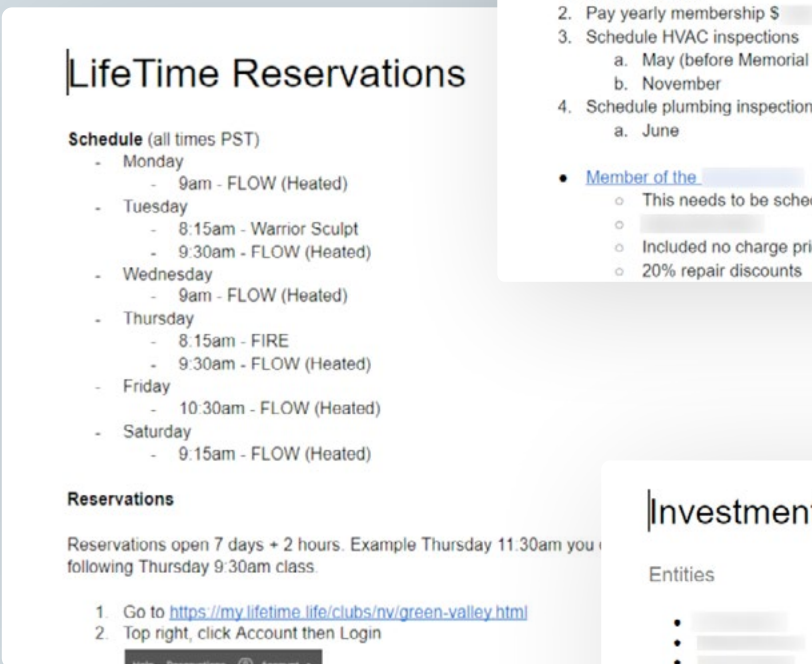


Air Control -

1. Call Air Control
2. Pay yearly membership $
3. Schedule HVAC inspections
   a. May (before Memorial Day)
   b. November
4. Schedule plumbing inspection
   a. June

- Member of the
  - This needs to be scheduled in January for the year. Appointments fill up quickly.
  - Included no charge priority services
  - 20% repair discounts

Vendor playbook example



LifeTime Reservations

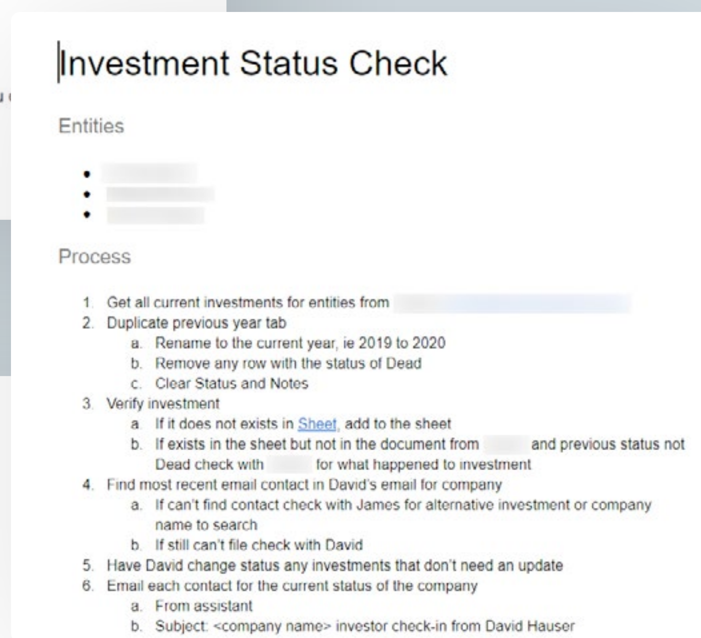
Schedule (all times PST)
- Monday
  - 9am - FLOW (Heated)
- Tuesday
  - 8:15am - Warrior Sculpt
  - 9:30am - FLOW (Heated)
- Wednesday
  - 9am - FLOW (Heated)
- Thursday
  - 8:15am - FIRE
  - 9:30am - FLOW (Heated)
- Friday
  - 10:30am - FLOW (Heated)
- Saturday
  - 9:15am - FLOW (Heated)

Reservations

Reservations open 7 days + 2 hours. Example Thursday 11:30am you c
following Thursday 9:30am class.

1. Go to https://my.lifetime.life/clubs/nv/green-valley.html
2. Top right, click Account then Login

LifeTime Reservations playbook



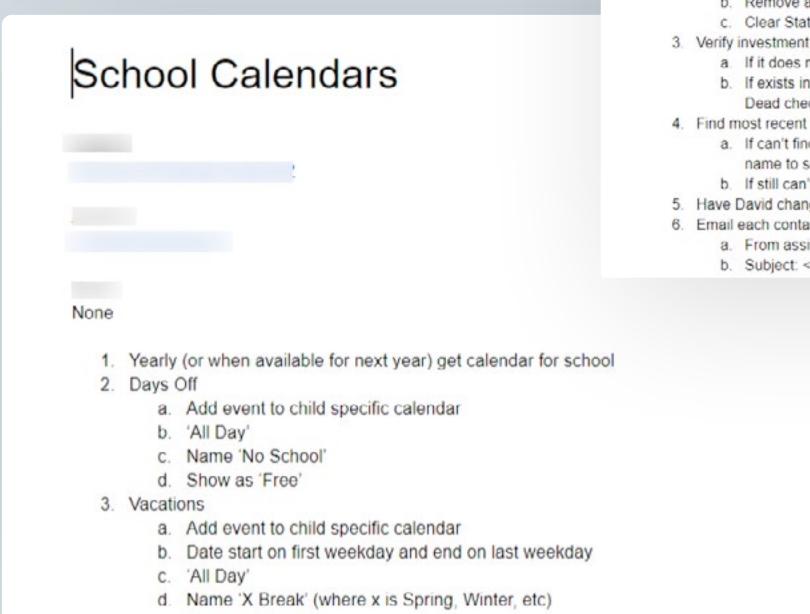
Investment Status Check

Entities

Process

1. Get all current investments for entities from
2. Duplicate previous year tab
   a. Rename to the current year, ie 2019 to 2020
   b. Remove any row with the status of Dead
   c. Clear Status and Notes
3. Verify investment
   a. If it does not exists in Sheet, add to the sheet
   b. If exists in the sheet but not in the document from and previous status not Dead check with for what happened to investment
4. Find most recent email contact in David's email for company
   a. If can't find contact check with James for alternative investment or company name to search
   b. If still can't file check with David
5. Have David change status any investments that don't need an update
6. Email each contact for the current status of the company
   a. From assistant
   b. Subject: <company name> investor check-in from David Hauser

Investment Status Check playbook



School Calendars

None

1. Yearly (or when available for next year) get calendar for school
2. Days Off
   a. Add event to child specific calendar
   b. 'All Day'
   c. Name 'No School'
   d. Show as 'Free'
3. Vacations
   a. Add event to child specific calendar
   b. Date start on first weekday and end on last weekday
   c. 'All Day'
   d. Name 'X Break' (where x is Spring, Winter, etc)
   e. Show as 'Free'

School Calendars playbook

READING LIST

- *Getting Things Done* by David Allen
- *Force Multiplier* by Tony Chatman
- *Atomic Habits* by James Clear
- *Virtual Freedom* by Chris Ducker
- *The Leader Assistant* by Jeremy Burrows

OUTSOURCING COMPANIES

- Zirtual
- Delegated
- Time etc
- Belay
- Sheperd

About the author

David Hauser is an entrepreneur, speaker, and investor who has founded and scaled multiple companies, including two exits to the tune of $250M. His first company, Grasshopper, was sold to Citrix in 2015. David was an angel investor in Intercom, Unbounce, Groove, and The Hustle, among others. He has appeared in CNN, Fox, Inc. Magazine, Wall Street Journal, and Inc. 30 Under 30. Today, David is the Managing Partner at Repeat Capital Partners and the founder of SuperFat, a keto snack company.

He lives in Nevada and writes regularly about health, money, and family in his newsletter.