

# Working with Associates

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# The Entrepreneurs Trap

When you are building your VA business, you have to be aware that, as an entrepreneur yourself, that you are not falling into the same trap that many of your clients have fallen into. What is that trap? It’s the entrepreneur trap.

“The Entrepreneurs Trap” means that the entrepreneur aims to do everything themselves, exchanges all their time for money, and therefore, becomes a self-employed employee of their business. This kind of defeats the purpose of becoming self-employed.

If you think that working full time as a VA is the aim, then that may be the best model for *you* but it is not for the vast majority of people starting out on this journey.

Your focus is to work for whom you wish and the hours that enable you to create the lifestyle that you wanted when you launch/launched your VA business. In addition, you want to focus on building associate VAs around you to act as the support you need to create that lifestyle, or, at least as back-up support when you need it. It is not about waiting until you have enough work to give to another VA; this is about you ensuring you provide full client management *and* give yourself the option to boost your income.

So, this module focuses on all the above. Escaping the entrepreneur trap, avoid thinking you have to work full-time, and building support around you as a back-up system as well as to help you create the lifestyle you dream of.

* Key reasons why you should have an Associate VA as part of your business
* How to find the right Associate
* Contracts and Fees
* Building a professional relationship
* What to do if it all goes wrong

# What is an Associate VA?

The reason for using associate VAs (the official term is subcontractor) is actually a part of your contingency plan, so that you can offer seamless and consistent support to your clients, offer services which your clients need yet you don’t have the skills to carry out, and also to help you to boost your income.

### What is Associate Work?

Associate work is basically where one VA outsources work to another. It may be that one VA is too busy, often referred to as the Lead VA, or that they do not have the time or skills to deliver a certain task or is simply not interested in doing the task and so they give the work to another VA at a lower rate than they receive from the client.

### Want to start out as an Associate VA

Virtual Assistant Associates work in much the same way as a virtual assistant in that they are self employed and work from home. You are still responsible for your own tax, national insurance, business running costs, supplying your own equipment, etc. So, everything you have learnt in your course so far is still relevant!

However, when you work as an Associate, your clients are the virtual assistants themselves who, rather than complete all their client work, pass on some or all of it to you. Although you may liaise with the Lead VAs clients, generally you will not have the authority to talk hours, money etc with the client.

It is critical to understand that however much contact you have with the end client (the virtual assistants client), this client is not yours. They remain the client of the virtual assistant, contracted to their organisation and invoiced and managed by them, and there are usually stiff penalties for trying to poach these clients in order to try to establish your own virtual assistant business. Never be tempted to go to these clients offering your services directly or try to undercut the virtual assistant that has introduced them to you. You will find yourself in court.

Having said that, if you would prefer to concentrate on completing work, rather than looking for clients, it is a great alternative to setting up your own virtual assistant business. The rates are obviously lower than you would expect as a fully fledged virtual assistant, but then again, you are not spending hours each week marketing your business in order to get clients.

You can expect to be paid between 50% to 70% of the hourly rate being charged by the virtual assistant delegating the work to you, with the virtual assistant keeping the remainder.

# Key Reasons to have an Associate VA

The number one reason for using associate VAs is actually that they should form part of your contingency plan, so that you can offer seamless and consistent support to your clients, offer services which your clients need but you don’t have the skills to carry out, and also to help you to boost your income.

There will be situations when you need support, either because you’re not well so you can’t concentrate on the business, you could be attending a conference or training or a networking event, or you could be taking holiday (yes that sounds like a long time away, but you will get there and be able to take a holiday!). Ultimately in those situations it’s really important that you’ve got the backup of another VA.

There may also be a point in time that one of your clients requires you to complete a piece of work and you don’t actually have the skill set to carry out. Because you don’t want to lose out on the income and avoid having a panic attack, you should ensure you have an associate who does have the skills to carry out that task and stops you from getting into panic mode. Once you have a niche or at least see a pattern in the types of tasks your clients are requesting, make a note to take on an associate who is a specialist in these tasks and it may also be worth your investment to train up to acquire these skills yourself.

Imagine being in the situation where you have a work overload and perhaps two clients urgently require your help at the same time. Of course you will need to ensure that you are regularly forward planning with your clients with regular updates and when conducting your client reviews, however, there be this eventuality. As you don’t want to let either of your clients down and be seen as having great customer care, having an associate will mean you can share the workload and deliver to both clients on time. Indeed, when you do have an associate work alongside you, it creates a great opportunity to boost your income!

# “I don’t have enough work to pass on to an Associate”

First of all, it’s not about saying to yourself I need to have enough business to pass over work to other VAs, NO NO NO!!! Your purpose is not to be able to make other VAs busier or boost other VA businesses. You MUST have back-up support as part of your contingency plan as mentioned above, otherwise you will let your clients down!!!

Let me give you an example that my VA Coach shared with me during my training course; “There was one VA that attended the VA Mastery Course and she insisted that she didn’t have enough work to pass over to another VA, that she was just starting out in her business and couldn’t see the advantage and the importance of having an associate. Within a week of completing the course she took on two clients and she was very busy working roughly 30 to 40 hours a week, brilliant! However, a few weeks later she fell very ill and unfortunately, as she had no associate VAs to support her, her clients who desperately needed support, went elsewhere.”

Remember that the reason they will come to you in the first place is because they need support in their business. It doesn’t do your business reputation any good if you show that there is no support other than you. If you do have that back-up support then they will see you as being very resourceful, and your client management is obviously then seen as being at a very high level. After all, how important is it that your clients stay with you?

If you need to grow your business and start taking on board associates, what action will you now take that is right for your business?

# Finding the Right Associate VA

When you know it is time to find the right person to be your associate, you may not know anyone very well at this stage of your business. However, if you are looking for someone with specific skills, a specialism or that you require someone to be in a certain location, your search will be easier.

You could be looking at fellow members of the VACT Facebook forum, asking your VA Trainer for introductions, or speaking to other business owners who you know are working with people that fit with your requirements, and ask for an introduction.

Ideally, you should be looking for someone with the same work ethics and values as yourself, and someone trustworthy as well. What some VAs have shown concern about is whether another VA could be trusted with their clients and what would happen if the associate tries to go behind their back and take a client of theirs. Firstly that’s why, even though you have a description of your ideal associate VA you must also go with your gut feeling as well. More about this later.

The best place to start is through personal recommendations. However, there are many VA forums online, including our own VACT Facebook forum, which you could be using to help you find an associate VA. You would get to know people through the discussions. One of the best ways is also to ask for recommendations. If a number of people provide you with a positive reference and one is negative, then ask to speak to that person for details about their experience.

You might possibly meet other VAs through networking events, conferences (especially UK VA Conference where many strong VA relationships have been formed www.vaconference.co.uk), or even through LinkedIn groups or through Twitter but again, where possible and if possible do meet them face to face.

When looking on forums, Twitter, Facebook or any other social media platform, make a note of how often they are taking part in discussions, note also what they are saying. If their ‘chat’ is not very professional, then you may need to reconsider your choice. This is one of the first places prospective clients look for VAs and they do look at the conversation history. Your choice is important as they are the people who will be representing your business when you need them to.

Be careful of mixing friendship with business also. Working with friends is not always the best policy, if you do, make it very clear what the boundaries are.

### Conduct a Discovery Session / Interview

In the same way, you conduct a Discovery Session with clients you could hold a type of Discovery Session with a potential associate.

Because there is no guarantee that the discovery session will convert into them coming onboard of your team, if you conduct the call via Zoom or Skype you will be able to see facial expressions, body language etc in answer to any questions / comments made.

Once you have made the arrangement for the call, even if you state it is 30-minutes, you may want to allow for an hour. Ensure you’ve agreed how you will communicate i.e. via Skype (ensure you have their Skype ID), phone (do you have their number?) or in person (send an email to confirm the meeting location).

Remember this is not a job interview, this is an exploration of whether the two business owners want to work together.

Ensure that you take up references, even employer references if the associate VA has just recently launched and has yet to take on their own clients. Look to see which professional associations they are a member of and what the standard expectations are of those associations. Joining a membership club is not enough of a reference. Establish if they carried out any professional training in their industry, both now as a VA and previously in their employment.

# Interviewing Your Prospective Associate

### Skills

When interviewing someone, you want to gain a deeper level of understanding of their skill set and find out a little bit more about some of their specialist skills especially if you are bringing an Associate onboard with a skillset you do not possess yourself. Ask about the specific areas they have helped their own clients with their skills, the results they have helped others to achieve (if relevant) and how their skills are unique in this area compared to others. Ask about professional qualifications they have gained that give them the edge. Where you can view any examples of their work, then do. Of course, if they are just starting out on their VA journey also, ask them the same questions in relation to their employment experiences.

Ensure you ask questions which outline how they work, what systems they use, what they are an expert in and what they are not an expert, how they communicate and like to receive instructions. You want to explore with them how they ensure they can keep to deadlines, what they do if they have interruptions when a deadline is to be met and who they have supporting them. If they have children or family commitments, ask them how they handle situations when they need to speak to a client but have children or animals in the background.

Pose to them scenarios of working with you where feedback is required. For instance, if you had a complaint about a task they completed and you gave them feedback that the work was not completed on time, to the standard you expected and had tasks incomplete, what would they do in that situation? Ask them how they would choose to respond.

You must remember that you are giving associates feedback; you are making sure that, anything they are not doing right is being rectified… because if you don’t give the feedback, and they continue doing what they are doing, it will ruin the relationship and your customer service for your client. It’s rather like a marriage; people will give advice to a newly married couple which is ‘always communicate to make the relationship work!’ That’s really, really, important that you do that.

### Availability

When discussing an opportunity with a prospective associate, ensure you are clear what you want in terms of their availability, as well as how many hours a week you want them to support you for.

If you are taking on an associate to work direct with your client, ask them how they can guarantee availability for that client. You would also need to know if they would be happy to continue supporting your client in the event their own business grows, and whether they would still dedicate time to your business.

Unfortunately, in some cases, associate VAs may wish to end their relationship with you because their own business is growing and can then only help you when you are going on holiday for instance, or literally if you have a panic situation.

Establish whether they will be a consistent or ad-hoc support for you. If you are going on maternity leave, you may wish to have a solicitor create a contract for your associates to sign with you to guarantee they support your clients on your behalf for the duration of your maternity leave. Do ensure you check legalities with your solicitor with regards to avoiding situations where your associate is then deemed your employee.

# Onboarding the Associate

### Test Piece

I generally recommend doing a test piece of work as a standard, I am also of the opinion that it should be a paid test piece on something for your own business or that which you know how long the task will take etc. Personally, when I do this test – I keep the brief a little loose to see if the Associate VA questions me about what it is I am looking for, format, timelines, purpose etc to see if they can add value to the process!

### Trial Period

When you are taking on board an associate VA, do explain to them that you are going to run a trial period with them. You would still have a contract signed and you would just stipulate that in the first month to three months is a trial period and if either party wanted to end the contract you would give one weeks’ notice. Beyond that it would be one calendar months’ notice. It’s really important that you do stipulate that this is a trial basis and you are speaking to other VAs as well. If something doesn’t go quite to plan and you feel after a couple of weeks this is not an ideal associate VA for your business, then you can end the contract with them.

### Updates

I generally say, in respect to Updates, a lot depends on whether you are wanting the VA to work direct with the client or through you. (Or is the VA acting as your back up support.)

As part of working with one another you would stipulate that you would share calendars so that you could see their availability, and you would have short updates weekly or fortnightly so that they were in the picture with regard to your client work. Ask them questions such as: “What would you do in the situation where you’re my associate and you have told me that you are available on a Monday morning, I’ve contacted you to ask you to complete a piece of work for my client but you have just received an urgent piece of work for your own client...what do you do?”. Think about how you would respond if their answer was that they would attend to their own client first. Actually in a sense, you are also their client!

You have to also put yourself in that same situation, and think about how you would respond. You have to take into account that legally you cannot stipulate on ‘paper’ the hours you wish an associate to be available, although as a verbal agreement you can. This is to do with not being seen as their employer!

Ultimately, you would expect an associate VA to honour time to you and do their best to ensure they could support you. Clients will often state something is urgent and you would want to know that, as much as their own diary would dictate, that your associate VA could support you in an emergency.

This does involve a lot of careful management and regular communication, being very clear on your expectations and that of your client, as well as, of course, managing those expectations. Where you have more than two clients, it is advised to have more than one associate back-up support. Possibly one for every two clients.

There is no right or wrong answer in this – but think about the type of responses you are expecting.

### Here are some examples of questions to ask of a prospective associate:

1. What hours are you available per day / week / month?
2. Can you cover my business consistently or only ad hoc basis?
3. What skill-set and professional experience do you have which makes you an ideal fit for my business?
4. Can you provide examples of work you have completed/testimonials or case studies? (Be aware that any past client work they show you must have proof of permission from their clients to avoid breach in confidentiality).
5. What systems / software are you familiar with or use?
6. What happens if we have a conflict with urgent work? I would want to understand how you will manage conflicting priorities.
7. What system do you use to project manage your client work?
8. What method do you use to ensure you can meet deadlines?
9. What time monitoring tools do you work with?
10. Have your registered with the Information Commissioner’s office?
11. What is your management style?
12. Are you VAT registered?
13. What are your core values?
14. What are your strengths and weaknesses?
15. Why do you want to be part of my team?
16. What would you do if my client approaches you to work with you direct?
17. What would you do if my client wanted to increase the number of hours of support – would you be open to growing with them?
18. How will I know if you are stressed?
19. Have you ever done a personality profile, if so which one and what were you?

### Scenario: “What would you do if my client approaches you to work with you direct?”

You’ll want to find out what would happen in the situation where your client contacts your associate direct to have a separate contract with them and cut you out of the equation. You do have to consider that this could have happened because the only contact you have had with your client is when you are sending them an invoice. It is crucial that you are having those updates and regular reviews with your clients to avoid the client from feeling neglected and unmanaged.

Therefore, the question to ask is: “You’re the associate VA, the client approaches you direct and says “Can we work together?”. How do you handle the situation and would you approach me about it?”. If you are meeting in person or on video Skype, their facial expression, as well as tonality, will tell you a lot!

Basically, only by having contracts in place means that if either the client or the associate wish to bypass you and work with one another without your consent, means that they are both in breach of contract.

The VA world is large but it’s a small world, so hopefully nobody would be silly enough to be unethical and untrustworthy.

Now if that was to happen, ultimately as part of the contract terms, both parties must give you one calendar months’ notice and actually neither party will be permitted, legally, to work with one another or having a direct contract with one another, for a period of 12 months. You can’t legally extend that because in a court of law that wouldn’t really be worthwhile, so it’s a maximum or 12 months.

What you could do is look at some form of compromise agreement, because you might actually think that it would suit you better if your associate was working direct with your client. Because you know you haven’t been giving your client 100% attention and actually the associate would be doing you a favour, you may no longer have that connection with the client anymore, the relationship has changed or they are looking for different skills. As a suggestion, explore some solutions with your associate, a financial agreement perhaps, so that every party is happy. Just as an example, it could be 30% of the income that you have earned over the last 3 months from the VA as a fee for taking your client on board.

Another option is to charge your associate a 30% fee of their next three monthly invoices from working with the client direct. Come to some sort of agreement where the associate would, in a sense buy the client off you, but it’s more of a compromise agreement as such. That would mean that you wouldn’t be able to take any legal action afterwards, and it’s important to have that agreement in place. Do have a legal representative work with you on this as opposed to doing this on your own.

# The VA Associate and Legals

The contract between the client and yourself is obviously the priority, but you must have a contract between yourself and the associate VA.

Some people have thought that there’s no point in having an associate contract because the associate is just doing something as a one off. Well let’s say in that one off situation something goes terribly wrong or confidentiality is broken, the associate causes all the information to be wiped off the client’s system, then ultimately you have no contract to guide you and support you in that situation.

You might want to use that associate again, perhaps for another client, you wouldn’t want to sign a different contract each time, there only needs to be one contract. It is so important to have a contract in place because not only is it ensuring your associate is abiding by confidentiality for your client’s business but for yours also. It is not advisable to put your business or that of your client’s at risk!

We all know that Sod’s Law comes into play when we least expect it. Sometimes there is an innocent misunderstanding in a working relationship, however, if a contract is not in place, then there could be expensive legal fees involved.

In the same way, your associate should have the appropriate insurances in place to do the work in which they are doing.

In the Legal Templates for VAs pack provided as part of the VA Mastery Course, there is an agreement for the engagement of an Associate.

### More than One!

In addition, it is advised that you have more than one associate. Where you have a number of clients, or indeed as you are growing your client base, you may want to consider having one associate to every two clients as back up. This means, in the event you are away from the business, one associate is not then responsible for your whole client base. This is bringing in risk because you have to consider what would then happen in the event their own clients require urgent support, or if they are unwell and unable to do anything at all.

# The Art of Delegation

Often we treat our VA business as if it was our baby, and in a way it is but I want you to put your CEO hat on and remember the lessons you give your clients when in comes to outsourcing and delegating!

It’s really important that you are very clear with your instructions. Generally it is advised that the associate VA does not have any contact direct with your client until you are satisfied with the trial, unless it is to cover in an emergency of course. You want to make sure that whatever is a representation of your business is a high quality one that matches your high standards.

Have you ever been in a situation where you’ve managed other people at all? If so, when it came to instructing them, did you find that most of the time they produced or did exactly what you’d asked them to do or where there perhaps some differing situations? You have to make sure that you always provide the associate with the tools and resources to be able to carry out the particular tasks. Summarise the instruction via email so there is evidence of the instruction, perhaps use an online system to keep track of instructions, so that if there was any discrepancy you’d be able to direct them to that instruction. Online tools to use include Smartsheet, Todoist, Huddle or Basecamp. These would be tools you use with clients to share, collaborate and update with regard to instructions.

Ensure you have asked them to tell you how they are going to go about doing the task so that you can encourage questions and manage your expectations.

How one person perceives a certain high standard may be perceived as something different by someone else. Note that everyone takes on board instructions in different ways, some people are very visual, some people are very auditory, it’s the sound of what you are saying and they’re listening skills are more acute, and some people will be a combination of the two; if they make a mistake you have to ask yourself whether you gave them very clear instructions; did you give them the opportunity to come back and ask questions and did they show that they understood? You can normally hear in someone’s voice if they don’t understand. Offer to go back over a specific area so that they are clear. Sometimes people are a little bit embarrassed about asking the questions, they don’t want to appear stupid. Actually it’s best that someone ask lots of questions and learn in the way that is effective for them, so that they can carry out the tasks effectively. The investment in training your associate how to do something means that they know how to do it next time.

### Deadlines

If you are the go between, between your clients and the associate you have to be very clear about the deadline of any work you pass to your associate. State that if they are late, that will have negative repercussions on your client, and then, ultimately, they may not get paid.

The same will happen if you have to redo the task (in the situation when you know you have instructed them clearly and there is written evidence). It’s within their interest to make sure that they complete the task correctly and within the timeframe given by you.

Therefore, if you have a deadline of 3 o’clock from your client, provide your associate with the deadline of 2.30pm, this allows you half an hour to check the work. Ultimately, even though you are delegating the task to somebody else, remember that the contract is between your business and the client and not with the associate VA. This means you are still responsible for anything to do with your client.

For this reason, it is strongly advised that you ensure you have taken out both professional indemnity and public liability insurance for your business. Please see more information on this in the Contract section below.

### Communication

You will know that you are working with the right VA because they will be somebody who is producing a high quality level of work. Of course, human errors do happen, so you have got to allow for that, therefore, watch and learn with the associate, notice what their communication is like with you. Ensure that they are communicating with you their whereabouts and letting you know if they have clashes with their own clients.

Right from the very start of the contract, you should be ensuring that you fully brief them about the clients they will be supporting you with and that they have access to the resources they need to complete designated tasks. If you are using online systems and file sharing sites, then ensure they have the usernames and passwords to access these on your behalf as well as client emails. Remember that they will have signed a contract with you, as well as, ideally an NDA – a Non-Disclosure Agreement, all of which protects you and your clients. Use tools such as Lastpass for the security of passwords.

Ensure your clients know the names of your associates who will be supporting you in your absence (this is a requirement), and ideally, to introduce your associates to your clients.

Having weekly or fortnightly updates allows you to update them with information on whatever you are currently supporting your clients with. This means that in the event you have a system crash, are unwell or have another urgent deadline, your associate already has an in-depth understanding as to where to support you and your client. (Remember if you are doing updates this often, you might need to pay your associate for the time they are having in update calls with you – as they are not able to support other fee earning clients if they are having an update call with you.)

Ensure that your associate is communicating with you the time they are spending on your client tasks and that they are fully aware of the hours to work towards. This is especially important if your client is working on a budget.

Communication is key as you can see here. Keep this up so there is no argument that something wasn’t communicated to allow for a slip in the service.

In the event you have clearly stated the time limits due to the client’s budget, if the associate goes over that time, then you do not have to pay them for that. This also means that, if your associate is learning how to complete a task, such as PowerPoint, then to ensure they know not to charge you other than the time it should have taken them to complete it if they were proficient.

### Feedback

Conduct a feedback session with your associate at the end of the first month and then the following. You have to be very open and honest because they may be doing something incorrectly and they don’t actually know about it, so you’ll be doing them a huge favour by giving them that open and honest feedback.

If you don’t like the way they do something, then you have to let them know. Your client may have taken you on board because of the way you operate in your business, therefore it is important that your associates follow your operational procedures and standards. It may be, for instance, that you’re not keen about the way they answer the phone or speak to your clients, then you have to let them know and teach them how they should be doing it. It is about your brand after all!

When you eventually do allow them to have direct contact with your clients and it is time for a client review, ask your clients for feedback about your associate VA. Ensure also that you have regular feedback sessions with your associates and any areas which need support from you can then be actioned.

# The Professional AssocIate VA Relationship

The relationship with your associate has to be based on being professional because, ultimately you have your business reputation and any VA you have as your associate has to be someone that matches your ethics and values as well as meet the expectations of your reputation. If you are good friends first or even become good friends, you must still adhere to your boundaries. Be aware that this could change the dynamics of your friendship.

How you conduct yourself as the main VA or Lead VA is almost similar to being their manager, although you must remember that your associate VA is also a business owner in their own right.

# Payment to Your Associate VA

### Invoicing

It is advised by the HM Revenue and Customs that you ‘verify’ the subcontractor on the matter of payment and to ensure that you have signed a ‘subcontractor’ agreement based on them being self-employed. Otherwise you could fall into the realms of employer and employee.

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### What to pay associates

There is no right or wrong answer here. What I share with you – is a fairly common practice.

Generally the associate will invoice you roughly 75% of the hourly rate that you are charging your client, if you wish not to let your associate VA know what you are charging your client then you may agree a particular hourly rate regardless of the hours that they work.

The associate who has a specialist skill will be charging a higher hourly or day rate, therefore it normally works out that you would pay them around 75% to 80% of their rate.

### Why would an associate want to work with your client at a rate lower than what they charge their own clients?

What you must bear in mind is that for each hour you charge your client, at least 25% of that hourly rate will cover your business resources such as marketing, attending networking meetings, taking on and managing your clients etc. Therefore, when an associate is handed work, they have not had to spend any of their resources or manage the client for you, and that justifies the 75%.

You will find in many industries, especially the training industry, that a lot of people act as an associate perhaps for an agency or large organisation because they are not having to go out there and get the business; if you’ve gone from being a VA to being a very busy VA, then ultimately it might be that a new VA would quite like the idea of working with an established VA because they might be learning from them as well as the fact that they are guaranteed some a certain amount of work.

Now of course, you can’t ever promise how many hours there would be, you wouldn’t want your associate to completely depend on that but if your clients are paying you on a retainer basis you can more or less confirm that you would need your associate VA for 20 hours a month etc. So you have to bear that in mind that when the associate VAs business becomes busy they may wish to divert their attention away from being your associate to their own business.

### Tracking time

Personally, I like my Associates to track their time using my time tracking software (see recommended resources for tools I use.)

If your client is paying you on an ad-hoc basis and they tell you that their budget is £200 for that month, you would ensure that you would only do the work based on their instructions and ideally where there is email confirmation.

In turn, you would have to make sure you are communicating that with your associate VA, and to communicate with them your client’s budget. If your associate goes over the agreed hours without notifying you or the client, the client is then within their rights not to pay you and then you in turn not to pay your associate.

If the client accepts the extra task, then this must be agreed in an email for proof. If the associate VA took it upon themselves to do some extra work, they can’t claim that back from you unless it was agreed. Therefore, all the numbers and all the sums have to be communicated with everyone.

Associates can claim back from you at cost the expenses they have incurred, which again must be agreed upfront.

If your associate has incurred any expenses such as making telephone calls, or postage or printing then that will be over and above their hourly rate, so it would be the hourly rate plus expenses. Of course you have to agree what those expenses should be and again there may be a budget and that may have to be within the £200 budget your client stipulated so that again has to be agreed at the very beginning.

Do bear in mind that your associate might possibly be VAT registered, so you have to see how you can absorb this within what you charge your clients. As you cannot pass it on to the client.

### What to do when a client doesn’t pay

What would you do in the situation where you’ve had your associate help you with ad-hoc client work but at the end of the month your client doesn’t or can’t pay you?

They may state that they have a cash-flow issue and can only pay you in 8 weeks, but of course your associate has honoured their part of their agreement by doing the tasks for you. What would you do? Would you pay your associate, bearing in mind you might not have the cash flow yourself which would negatively affect your cash-flow, or would you tell them that they have to wait? The only downside with an overdraft is that you would end up paying interest unless you got a special agreement of course, that is different.

Of course this is not an ideal situation really, and you don’t want to be known as the person who doesn’t pay your associates, because again that changes your reputation as well. So that is why you want to get your clients to pay onto a retainer package. Bearing in mind there are ways to obtain payment from your clients with a good solicitor or credit collection agent.

# Specialist Services from Associates

As a reminder, when you conduct a new client consultation, you will be exploring, with your new client, what their important goals are in the short and long term. Therefore, when conducting your client management, you will be seeking ways in which to support your clients to achieve those goals. This may mean that, some of their goals could only be achieved if there was the support available from someone with a particular specialist skill, such as branding or web design, podcasting or marketing.

Therefore, in order to avoid losing out on that opportunity of providing that support from your business to your client, it is then advised that you either up-skill or take on board an associate who is a specialist and who can then support your client. In the situations such as providing a client review, you can then discuss this with your client and grab the opportunity of both supporting your client to achieve their goals and increasing your income.

Therefore, your associate may not always be a VA, they might be someone from a different profession, such as an accountant or bookkeeper for instance. They could be a trainer, or someone that specialises in social media or marketing consultancy.

You would still have to have a contract with them, but in terms of the fee, this would be different (as mentioned in the invoicing section).

When taking on an associate who is a specialist in a different service, it is advised that you take time to understand what they do and the results they help their clients to achieve. You should also be familiar with the type of questions they answer when taking enquiries, so that you can handle the enquiries yourself instead of going to and fro between your client and the associate.

It may be the case with a specialist associate that they have to work direct with your client because of the nature of what they do. They have to always remember that when communicating with your clients, they are doing so as a member of your team!

You will need to ensure your associate is set up with your company email and email signatures are branded to your business.

# Termination of an Associate Contract

In terms of working with an associate, once you have set the very strong foundations in place, you can create a winning team and a great business offering. However, in the event either you or the associate wish to end the contract, this must be put in writing and the relevant notice must be provided, just as you would with a client.

A debrief meeting or conference call should be arranged so that both you and the associate understand the reasons and give feedback. All feedback is good feedback!

# Final Thoughts on Associates

In terms of working with associates, there is a lot there, but it’s all about strong management, clear and constant communication skills, giving feedback and good customer service. The service that you are providing your client should be seamless and consistent.

Ideally, with every process you go through in your business, note it down and create an operational manual, so that someone else reading this would be able to run your business as if they were you.

And to summarise the reason to use associates:

1. They help with your consistent client management. As part of your client management you have a contingency plan and in the event your computer clashes, you are unable to complete a task as you don’t have the right skills, you are unwell etc.
2. The passive income boosts your cash-flow. For example, when you’re doing work for your clients and at the same time you’ve got your associates VAs carrying out tasks for your client earning you an additional hourly income.
3. Therefore, by having an associate VA you can see that it’s not just there to boost your income but it’s protecting your business, your business reputation and your client customer service.
4. The whole process is not always easy, but the model is simple in fairness!

# Exercises around Associates

1. Imagine you are now in a position to start exploring VAs to take on as associates. Write out an outline of a ‘role description’ with criteria of skills, experiences and availability you would be looking for in your search.

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1. Write out a list of a minimum of 15 questions you would want to ask a potential associate VA in an interview situation.

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| *1.*  *2.*  *3.*  *4.*  *5.*  *6.*  *7.*  *8.*  *9.*  *10.*  *11.*  *12.*  *13.*  *14.*  *15.* |

1. How would you identify your ideal associate VA? Where would you look to find them? What things will you be thinking of?

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1. You speak to a potential associate VA who is of a very high standard and you have identified that they would be a great match working with your clients. When you come to discuss fees, you state a fee that you want to pay them. However, the potential associate knows what your hourly rate is and quotes that they wish you to pay them 75% of that, not the lower rate you had quoted i.e. £22 per hour. What do you decide to do in this situation?

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1. What steps would you take to ensure you are able to continue to build a solid working and professional relationship with your associate VAs?

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1. Create a process that you can use to effectively delegate to your associate/s, so that you know that you are effective in your instructions to those that take on instructions and learn in different ways.

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7. You take on a new associate VA on, on a three month trial basis. Within the first month they have made a few errors, clearly demonstrating that they have not checked their work before sending it to you. In addition, they have not managed to meet your deadline, which has resulted in you sending work back to your client late. Your client is not impressed.

You know that, with each instruction to the associate VA, you have given very clear guidance with the work, resources needed and deadlines. What action do you take now and why?

Do you then pay your associate when you know that you have to rectify the work and explain to your client the reason for the missed deadline?

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1. Your associate VA explains to you that their own business is growing and they themselves are now in need of associate support. This, therefore, means they are no longer able to support you with your overflow of work or to support any of your clients direct.
   1. How do you choose to handle this situation when you know that the clients who have been supported by this associate VA, have been really happy with them?

* 1. What can you do in the future when taking on associates whose businesses are developing, especially when you have a number of clients on board?

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1. Your associate has approached you, to inform you, that your client has asked to work direct with your associate and to, therefore, end the contract with your business, you have done nothing wrong i.e. you are always communicating with the client, but in this case, the client wants to work direct. What do you do to create a solution that everyone is happy with?

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1. How do you ensure that, as your client’s business grows, your business expands by supporting them further?

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1. How do you find opportunities to offer specialist services to your client? What steps would you take to ensure your business can offer those specialist services?

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# Now for the Legal Stuff…

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