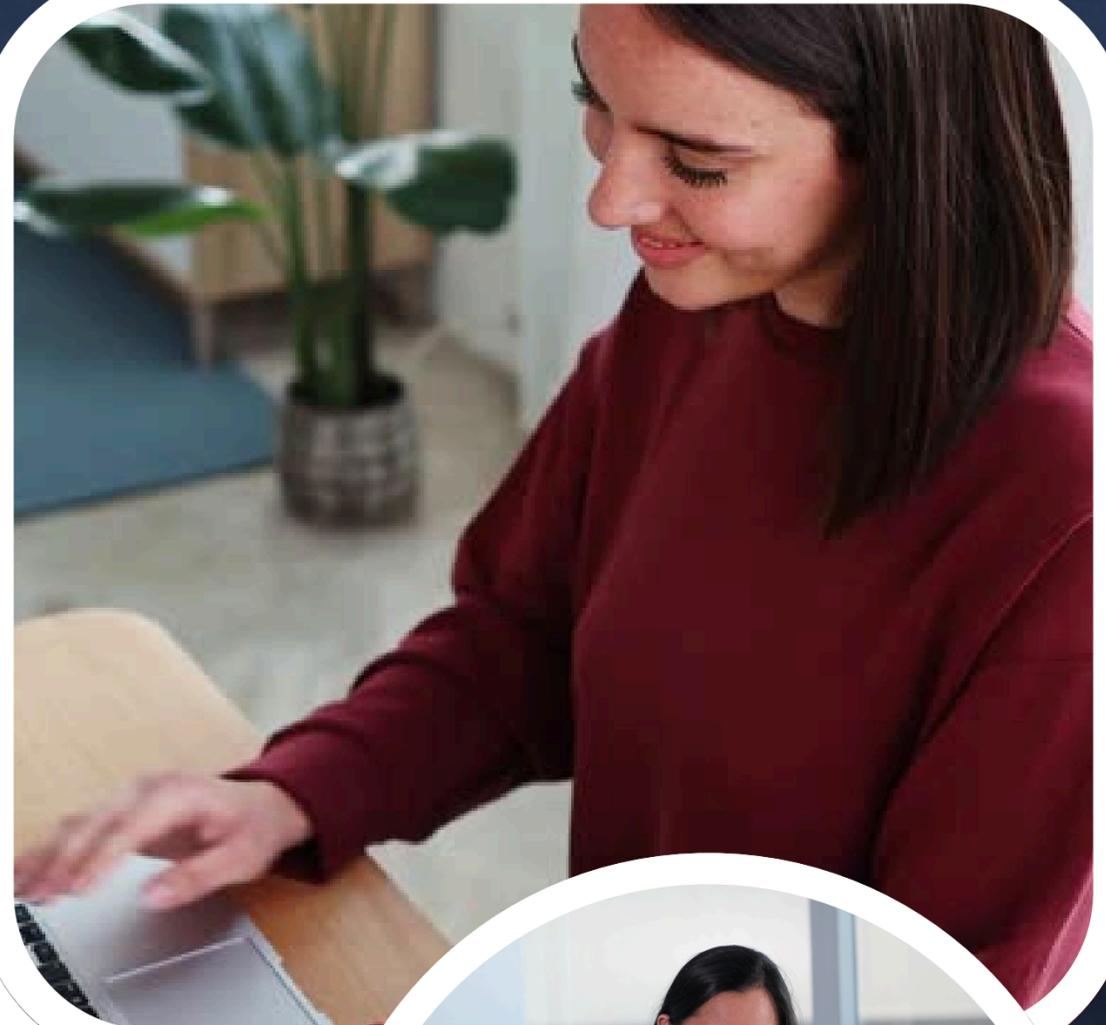




**OUTSOURCE ACCESS™**  
REDEFINING HOW YOU SCALE

# NEXT-GEN ● VIRTUAL ASSISTANT:

HOW TO STAND OUT, STAY SHARP, &  
SUCCEED IN A VIRTUAL-FIRST WORLD





# OA BACKGROUND

Founded by **Brad Stevens** in 2019

Lifetime entrepreneur who leveraged outsourcing in the Philippines to save his last business

Wanted to bring the life and business transformation of outsourcing/VA's to other small to medium businesses

Grew to 500 staff in just over 4 years serving 75 different industries in all business functions

8 global or national awards for performance and impact





# Outsource Access Fast Stats

**16M+**

Tasks completed - proven reliability and experience.

**100k**

Filipino candidates vetted  
- Only the best make it through.

**700+**

Businesses supported

**70+**

Industries supported

**5yrs+**

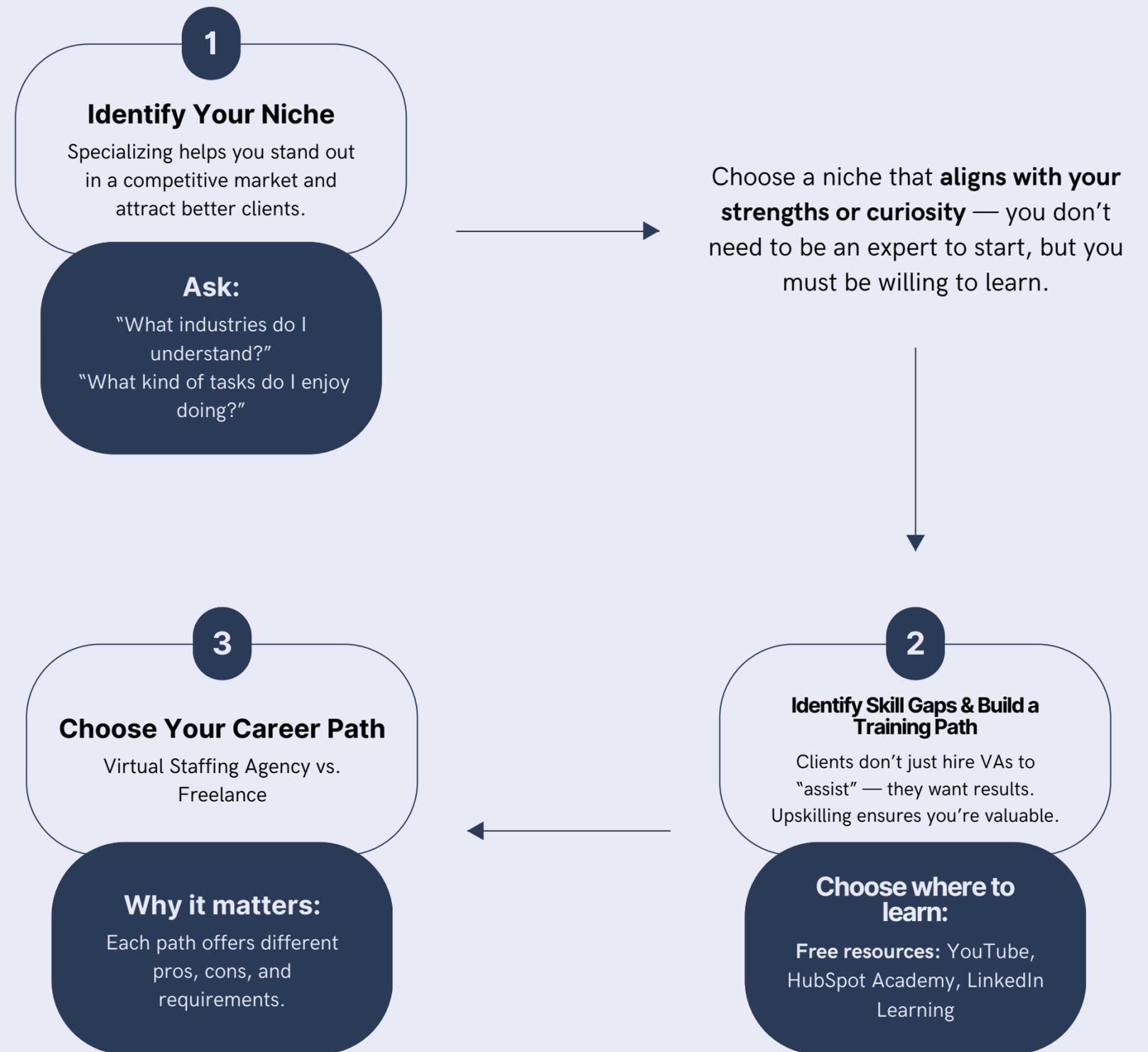
in the industry



# AGENDA

- The Virtual Assistant Career Path
- What Companies Look For When Hiring Remote/Virtual Talent
- The Right Mindset & Traits to Succeed
- Foundational Skills for VA Success
- Common Mistakes VAs Make (and How to Avoid Them)
- Adapting and Thriving in an AI-Driven Remote Work Landscape
- Q&A

# The Virtual Assistant Career Path



# Choosing the Right Path: Independent Work or Agency Support?

	Freelancing or Going Direct-to-Client	Working with an Agency like Outsource Access
<b>PROS:</b>	<ul style="list-style-type: none"> <li>• <b>Higher Pay Potential (Initially):</b> Freelancers may charge higher hourly/project rates without agency overhead.</li> <li>• <b>More Autonomy:</b> Control over who you work with, your schedule, and project selection.</li> <li>• <b>Entrepreneurial Growth:</b> Opportunity to build a personal brand or independent business.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Stable, Long-Term Opportunities-</b> Gain reliable placement with thoroughly vetted clients who value consistency and professionalism.</li> <li>• <b>Career Growth &amp; Development-</b> Benefit from structured training, ongoing mentorship, and skill-building programs designed to help you grow beyond task execution.</li> <li>• <b>Receive end-to-end support</b> — from onboarding and technology assistance to performance coaching and client relationship management.</li> <li>• <b>Team Environment:</b> Working in a team environment fosters collaboration, accelerates learning, and builds a strong sense of support and belonging.</li> <li>• <b>Pathways to Advancement-</b> Defined career tracks enable growth into leadership positions, specialized roles, or strategic client-facing functions, fostering long-term professional development.</li> </ul>
<b>CONS:</b>	<ul style="list-style-type: none"> <li>• <b>Income Instability:</b> Projects come and go; downtime between gigs is common.</li> <li>• <b>Challenging Client Management:</b> Finding clients, negotiating contracts, chasing payments, and handling disputes are all on your shoulders.</li> <li>• <b>No Built-in Support:</b> No HR, training, tech support, or backup team — you're on your own.</li> <li>• <b>No security of tenure</b></li> <li>• <b>No government benefits</b></li> <li>• <b>Isolation:</b> Lack of community or long-term peer collaboration can lead to burnout or skill stagnation.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Structured Compensation Model (Initial Phase):</b> Starting rates may be lower compared to some freelance arrangements, but are offset by access to infrastructure, client management support, and long-term stability.</li> <li>• <b>Less Autonomy:</b> Assignments are matched based on fit — you may not always pick your projects.</li> <li>• <b>Policy Adherence Required:</b> As part of a professional team, adherence to established processes and expectations is essential to ensure quality and client satisfaction.</li> </ul>

# What to look for in a Virtual Assistant Company?



## 1. Legally Incorporated in the Philippines

A legitimate, registered company provides stability and operates under Philippine labor laws—ensuring you're protected and treated fairly.

## 2. Full-Time Career Path, Not Just a Gig

Choose a company that offers career development, not just freelance tasks. Look for structured roles, growth opportunities, and internal promotions.

## 3. Government-Mandated Benefits + HMO

A serious employer should provide:

- SSS, PhilHealth, and Pag-IBIG
- 13th Month Pay
- HMO/Health Insurance
- Proper payslips and tax documentation

## 4. Security of Tenure

Avoid project-based setups where your contract ends without notice. Look for a firm that provides long-term placements with stable clients.

## 5. Positive Company Culture

- A great VA company should:
- Promote open communication and team support
- Celebrate achievements and provide recognition
- Offer training, wellness programs, and community

# What to look for in a 'direct' client?



## 1.) Clear Scope and Expectations

They know what they need and can explain it clearly.

## 2.) Fair Rates and Respect for Time

They understand the value of your work and are willing to pay accordingly.

## 3.) Wants a Long-Term Relationship

They mention repeat work, retention, or growing your role over time.

## 4.) Responsive and Professional

They respond to messages in a timely and respectful way..

## 5.) Open to Feedback and Collaboration

They treat you as a partner, not just a task-taker.

## 6.) Willing to Sign a Contract or Pay a Deposit

Indicates seriousness and protects both parties.

## 7.) Positive Reviews or Referrals

If they come recommended or have great reviews, that's a strong signal.

# Virtual Assistant Career Paths

## General Admin & Executive Support

- Administrative Assistant
- Executive Assistant
- Data Entry Specialist
- Calendar & Email Manager
- Document & File Organizer

## Finance & Accounting

- Bookkeeper
- Accountant (remote junior or support role)
- Payroll Assistant
- Invoicing & Billing Specialist
- QuickBooks/Xero VA

## Marketing Support

- Social Media Manager
- Content Scheduler / VA
- Email Marketing Assistant
- Marketing Automation VA (e.g., HubSpot, Mailchimp)
- Podcast or YouTube VA
- SEO Assistant

## Sales Support

- CRM Manager (e.g., HubSpot, Salesforce)
- Lead Generation VA
- Cold Outreach Specialist
- Proposal/Quote Assistant
- Follow-Up & Nurture Coordinator

## eCommerce & Online Business

- Amazon / Shopify VA
- Product Listing & Optimization Specialist
- Order Fulfillment Support
- Inventory & Supplier Coordinator
- Customer Reviews Manager

## Tech & Creative

- Website Maintenance VA
- Graphic Design VA
- Video Editor VA
- Tech Setup VA (funnels, plugins, integrations)
- Online Course Assistant (Kajabi, Teachable, etc.)

## Industry-Specific Specialists

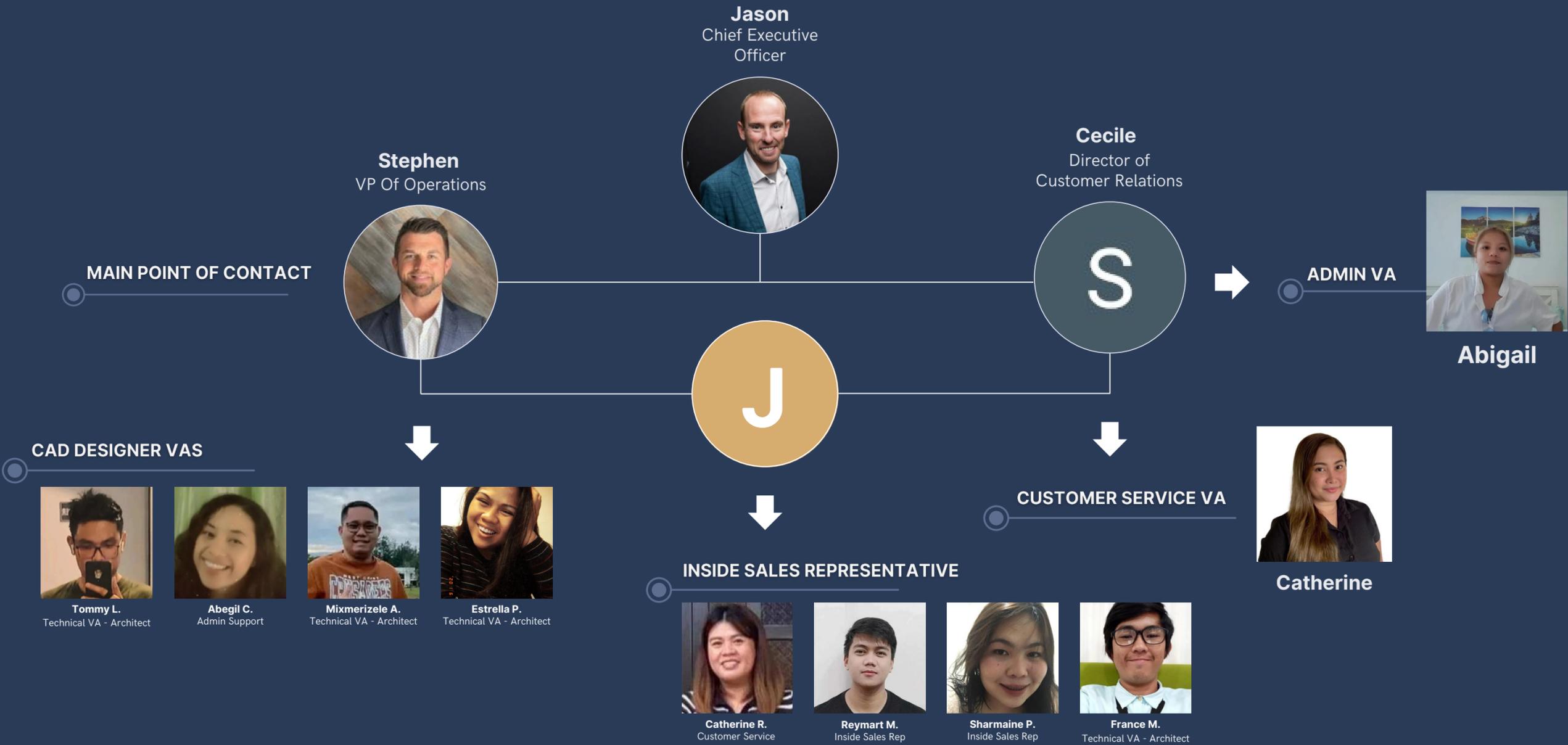
- Real Estate VA (CRM updates, listing coordination, lead gen)
- Legal Assistant VA (doc prep, client intake)
- Healthcare VA (scheduling, follow-ups, insurance coordination)
- Construction/Roofing VA (project tracking, estimate prep)

## Customer Support

- Customer Service VA (phone, chat, email)
- Client Relationship Manager
- Appointment Setter
- Helpdesk Support Assistant

# National Outdoor Services Company

# OA Integrated Offshore Teams



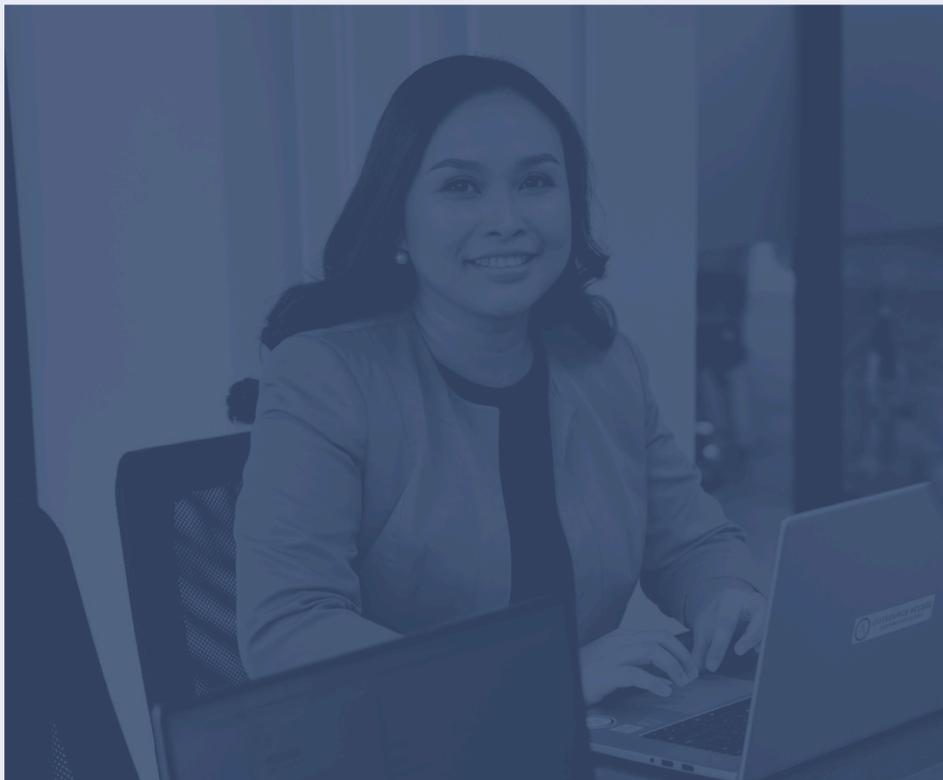


AT THE END OF DAY ITS ABOUT

~~Affordable~~

~~Offshore~~

Talent





## Proactive Communication

Executives value VAs who communicate clearly and take initiative—sharing timely updates, asking relevant questions, and anticipating needs without being micromanaged. This proactive approach keeps tasks on track and aligned with their goals.

## Reliability and Strong Work Ethic

Filipino VAs are known for their dedication and professionalism. Executives value their reliability, independence, and flexibility with time zones, making delegation easy and trustworthy.

## Technical Competence

A skilled VA is comfortable with tools like Trello, Slack, and HubSpot, making it easy to adapt to existing workflows and systems.

## Organizational Skills

Strong time management and organization allow VAs to juggle tasks, set priorities, and keep workflows smooth—freeing executives to focus on big-picture decisions.

## Cultural Compatibility & Professionalism

Filipino VAs are a great fit for international executives thanks to their cultural alignment with the West and strong service mindset, making collaboration smooth and professional.

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# What Companies Look for in Their VA's

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## Gratitude

Our team is humble with a strong sense of Gratitude. Our team is passionate about the work that we do and our passion drives us to go beyond what is expected of us.



## Relationship Driven

We are relationship driven and place our relationships with our team and customers above dollars, everyday of the week.



## Everlong Quest for Improvement

We are deeply committed to personal growth and have everlong thirst for knowledge.



## Accountability

We don't let others down, we welcome proactive difficult conversation.



## Teamwork

We don't point fingers. We collaborate and build bridges together.

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# Right Mindset to Succeed

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# Minimum 27 hours of focused learning to prep for a VA role

Loom/Screencasting  
Email Management  
Written and Verbal Communication Skills  
Clarity, Tone, and Conciseness in Messaging  
Building Rapport through Empathy  
Paraphrasing and Summarizing for Clarity  
Video and Messaging Tools: Zoom, Microsoft Teams, Slack  
Asynchronous Communication: Loom for Video Updates  
Prioritization Techniques (Eisenhower Matrix, ABC Method)  
Balancing Urgent and Important Tasks  
Structuring an Ideal Week  
Handling Calendar Conflicts  
Tools Overview: Microsoft Outlook, Google Calendar, Todoist  
Time Tracking and Analysis Tools: Toggl, Clockify, Time Doctor  
Soft Skills Training: Cultural Sensitivity  
Soft Skills and Professionalism  
Definition and Scope of Responsibilities  
Key Qualities of Successful Executive Assistants  
Unique Challenges and Opportunities in Supporting High-Performing CEOs  
Growth Mindset and Adaptability  
Commitment to Excellence and Proactivity  
Cultivating Emotional Resilience and Self-Awareness  
Understanding the Importance of Accuracy  
Strategies for Quality Control  
Practical Exercises for Improving Attention to Detail  
Clarity on the Executive Assistant's Impact  
Confidence in Applying Tools and Skills  
Readiness to Build Long-Term Success with a CEO  
Understanding Project Life Cycles  
Setting Clear Objectives and Milestones  
Delegation and Team Coordination  
Monitoring Progress and Managing Deadlines  
Overview of Platforms: Asana, Trello, Monday.com  
Integrating Tools with Workflow Automation  
Achieving Inbox Zero: Categorization and Prioritization



# Foundational Skills

- Basic Digital Skills
- Typing and Formatting
- Email Management
- Calendar Management
- Document Handling
- Knowledge in Using Communication Tools
- Online Research
- Task Management
- File Sharing & Storage



# Soft Skills

- Communication (Professional Online Etiquette)
- Time Management, Proactivity
- Critical Thinking
- Attention to Detail





## Computer Specification Requirements

### For General VA applicants:

#### Processor

- Core i3 - 8<sup>th</sup> to 11<sup>th</sup> generation
- Core i5 - 6<sup>th</sup> to 12<sup>th</sup> generation
- Core i7 - any generation
- AMD Ryzen 3 2200 and above
- Ryzen 5 2000 and above

#### If Mac:

- Core i3- 2018 or higher
- Core i5 - 2017 or higher
- Core i7 - 2016 or higher
- Apple M1

#### RAM

- Minimum: 8GB

### For other open positions :

#### Processor

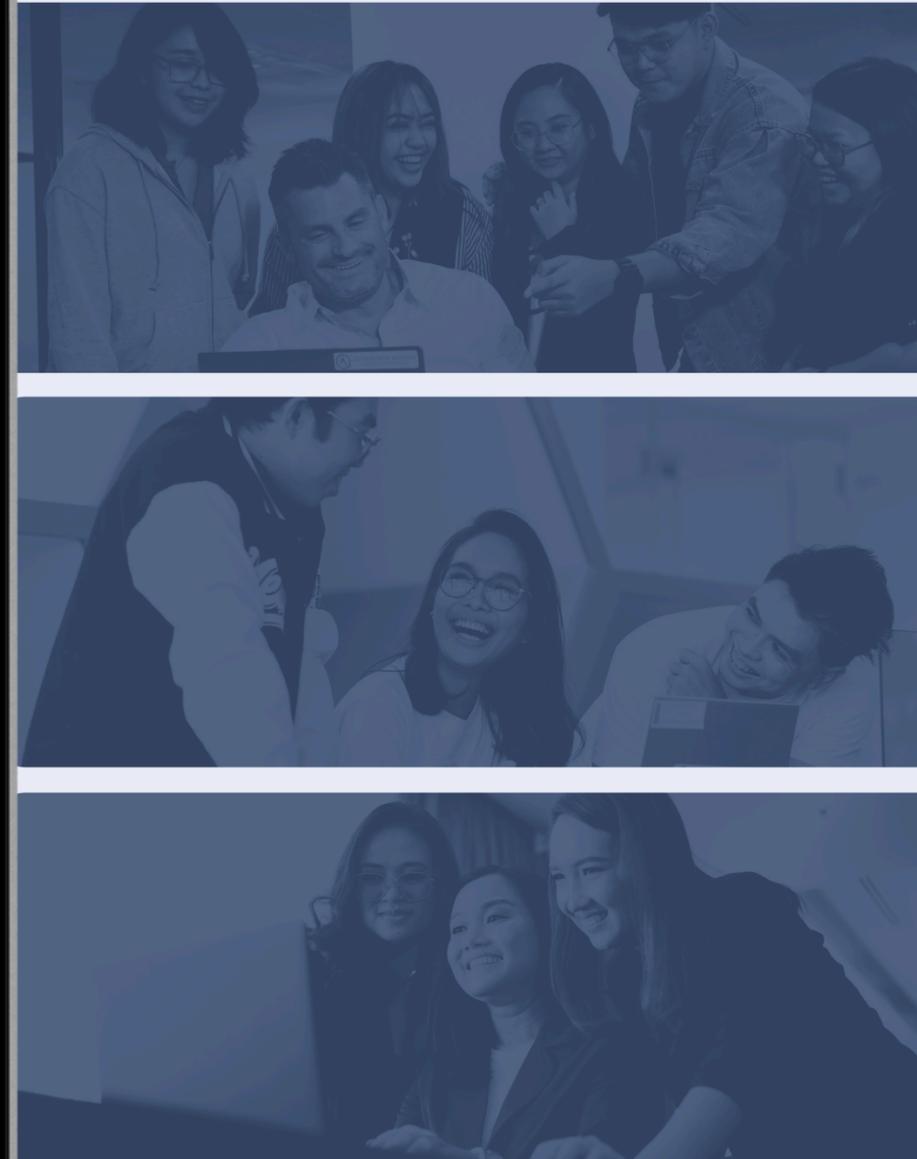
- Core i3 - 10<sup>th</sup> and 11<sup>th</sup> generation
- Core i5 - 8<sup>th</sup> to 12<sup>th</sup> generation
- Core i7 - any generation
- AMD Ryzen 3 2200 and above
- Ryzen 5 2000 and above

#### If Mac:

- Core i5 - 2017 or higher
- Core i7 - 2016 or higher ( Not recommended : Core i3)
- Apple M1

#### RAM

- Minimum: 8GB





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Things to keep in mind

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# Common Mistakes a VA Makes and How to Avoid Them



# Common Mistakes a VA Makes and How to Avoid Them

## 1. Overcommitting on Skills



### Examples:

- Claiming to be proficient in Excel or Google Sheets but struggling with formulas or data cleaning.
- Saying you can manage social media strategy when you've only handled scheduling posts.
- Agreeing to design tasks using Canva or Adobe without experience in visual design principles.

### Tips to Avoid:

- ✓ Be honest about your current skill level; say, "I have basic experience, but I'm open to learning."
- ✓ Highlight your willingness to upskill and take training when needed.
- ✓ Offer alternative solutions (e.g., "I can support basic graphics, but for advanced design, I can collaborate with a designer").

## 2. Schedule Misalignment

### Examples:

- Agreeing to work a night shift (e.g., US hours) during the interview but consistently submitting tasks late.
- Accepting overlapping client schedules without assessing your actual availability.
- Logging in late for meetings or being unavailable during agreed hours.

### Tips to Avoid:

- ✓ Be realistic about the schedule you can sustain long-term.
- ✓ Clarify expectations early—don't just say "yes" to please the client.
- ✓ Use calendar tools or alarms to ensure punctuality and coverage during critical hours.

# Common Mistakes a VA Makes and How to Avoid Them



## 3. Inconsistent End-of-Day (EOD) Communication

### Examples:

- Only sending updates when asked.
- Providing vague summaries like “worked on tasks” with no specifics.
- Missing EOD updates on busy days, leaving the client unsure about progress.

### Tips to Avoid:

- ✓ Send a simple, structured EOD message daily (e.g., tasks completed, in-progress items, blockers).
- ✓ Set a daily reminder to submit your EOD before logging out.
- ✓ Use a consistent format to save time and make reports easier to read.

## 4. Being Reactive Instead of Proactive

### Examples:

- Waiting for the client to assign the next task rather than suggesting what comes next.
- Not flagging issues until they become problems (e.g., delays, missing info).
- Following old instructions even after noticing a more efficient process.

### Tips to Avoid:

- ✓ Think one step ahead—ask yourself what the client might need next.
- ✓ Suggest improvements to current systems or workflows.
- ✓ Use phrases like “I noticed...” or “May I suggest...” to introduce new ideas confidently.

# Common Mistakes a VA Makes and How to Avoid Them



## 5. Not Staying Updated on Tools or Trends

- The digital landscape is always changing. Falling behind on tools like CRMs, automation platforms, or communication apps can limit efficiency.

**Tip:**  Dedicate time monthly to learning new features or best practices for the tools you regularly use. Even small improvements can make a big difference in performance.

## 6. Overdependence on the Client for Direction

- While clients provide the vision, they look to VAs to handle execution. VAs who wait for every step limit their value.

**Tip:**  Take ownership of tasks and look for areas where you can make decisions, optimize, or simplify processes. Show that you're a partner, not just an assistant.

## 7. Not Asking Questions Early

- VAs sometimes avoid asking questions for fear of seeming unprepared, which can lead to misunderstandings or mistakes.

**Tip:**  Asking clarifying questions shows initiative and ensures accuracy. It's always better to ask once than to redo a task multiple times.

# Common Mistakes a VA Makes and How to Avoid Them



## 8. Limited Understanding of the Client's Business or Industry

- Without context, it's hard to prioritize tasks or suggest improvements.

**Tip:**  Invest time in learning about the client's industry, target audience, and competitors. This allows for smarter decisions and more relevant support

# AI Trends in the Virtual Assistant Industry and How You can Stay Relevant

## Master Emerging AI Technologies

Proactively adopt and integrate AI platforms (e.g., generative AI, automation suites, CRMs with embedded intelligence) to enhance service delivery and stay ahead of client expectations.

## Elevate to Strategic Enablement

Transition from purely administrative support to becoming a strategic partner—offering insights on operations, client engagement, and scalable systems design.

## Deepen Industry-Specific Expertise

Carve out a competitive edge by specializing in sectors such as fintech, digital health, or real estate—aligning your services with industry pain points and compliance needs.



# AI Trends in the Virtual Assistant Industry and How You can Stay Relevant

## Leverage Human-Centric Capabilities

Cultivate emotional intelligence, critical thinking, and interpersonal communication—core human traits that remain irreplaceable despite rapid automation.

## Rebrand as an AI-Augmented Professional

Position yourself not just as a virtual assistant, but as a tech-enabled collaborator who leverages AI to drive speed, precision, and innovation in remote work environments.



# AI Trends in the Virtual Assistant Industry and How You can Stay Relevant

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- Complimentary Personality Profile Assessment for First 50
- PDF Copy of Today's Presentation Slides
- Starter Guide: How to Begin Your Virtual Assistant Journey
- Skills Development Roadmap: Become a Rockstar Virtual Assistant
- Step-by-Step Instructions to FREE Access Our Premium Executive Assistant Training Program (valued at ₱1500)





# Claim your Complimentary Virtual Executive Assistant Course!

As a thank you for attending this DICT webinar, Outsource Access is giving away free access to our Executive Assistant Essentials Course—built by experts and trusted by global companies.

**Perfect for aspiring Virtual Executive Assistants who want to:**

- Learn remote support skills
- Use real-world tools
- Land a home-based job with benefits

# Say It & Slay It!

## Say It & Slay It – Get a FREE Spot in Our EA Course!

How to Apply for the Virtual Executive Assistant Course:

1. Record a 1-minute video or audio on your phone.
2. Answer this question: "Why do you want to become an Executive Assistant?"
3. Scan the QR code in the image to open the Google Form.
4. Fill out the form and upload your video or audio recording.
5. You can also upload your resume (optional).

**Deadline:** Submit by May 23

**The first 100 entries will get a slot in the Virtual Executive Assistant Course.**

If you're selected, you'll get an email after the winners list is posted on the Outsource Access Careers Facebook page.





# Let's stay connected!

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