COACHYU

LEVEL 1
VIRTUAL
ASSISTANT
GUIDE

Dennis Yu
Host of the CoachYu Show

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Introduction

You will be learning constantly as you move forward through the CoachYu program. Do your research: Be proactive and do research before asking questions. Suggest the solution you think is correct when you ask your questions whenever possible.

Search with Google, specifically if you are looking for information that is not specifically a BlitzMetrics practice or process, (e.g. how to link a specific time in a Youtube video, how to use a WordPress plugin, etc.).

Ask your team lead via email or Skype. If you are new to the system, be sure to send out an email with your Skype username to get connected to the rest of the team. Our senior team members have a huge email load, so refer questions to your team lead whenever possible. You can locate your team lead in the Team Roster.

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Key Assets

Only internal team members of CoachYu will have access to these documents. If you are not an internal team member, and you need access, you are very unlikely to gain access.

Make sure to have access and bookmark these assets and the assets that follow:
- Client Tracker.
- Operations Process Guide.

How To Use The Daily Tasks Checklist

TEMPLATE Daily Tasks Checklist
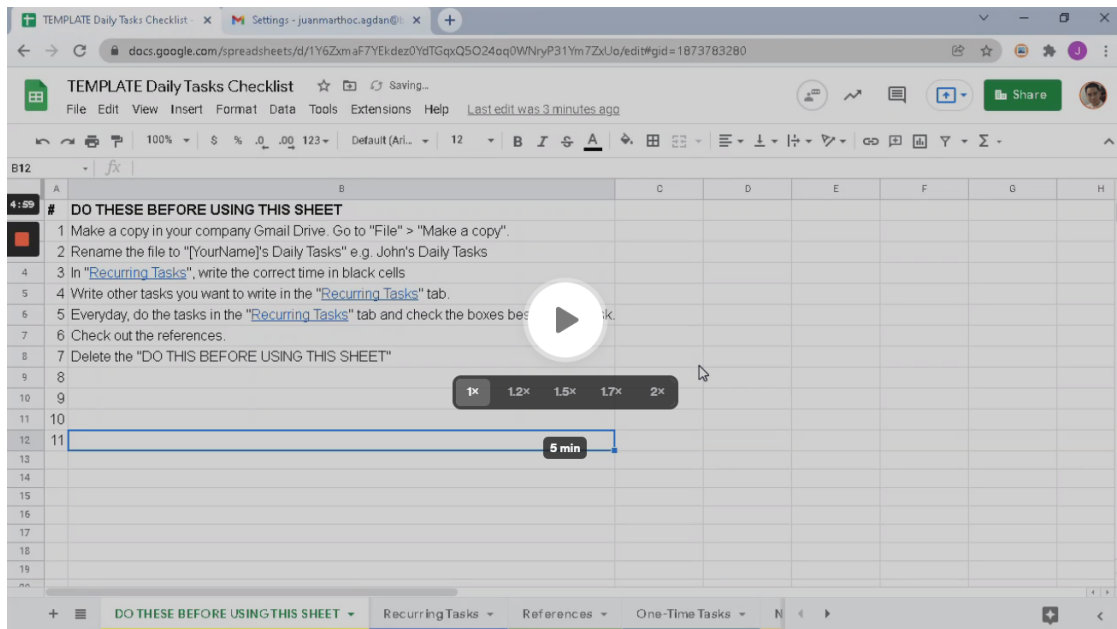
Video Guide: How To Use The Daily Tasks Checklist (4:33)

Asset Tracker

There is a huge amount of information in our current courses, programs and guides, which you'll find in the Asset Tracker tab: Important Docs.

Courses and Programs are composed of many components such as the guide, videos, presentation version, and so forth. Team members often mistakenly believe that the PDF guide is the course itself.

BlitzMetrics Content Library

There are countless articles that BlitzMetrics has written on a wide variety of marketing topics, which you'll find in our Content Library.

Team Roster

Ideally, nobody on the team will ever have to ask anyone for their Skype, email, phone number, time zone, birthday, and so forth, since we keep this information updated in our Team Roster.

Take a moment to make sure your information is up-to-date, and bookmark the document for future uses. Add a row to insert your picture and contact information.

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How To Access BlitzMetrics YouTube Library
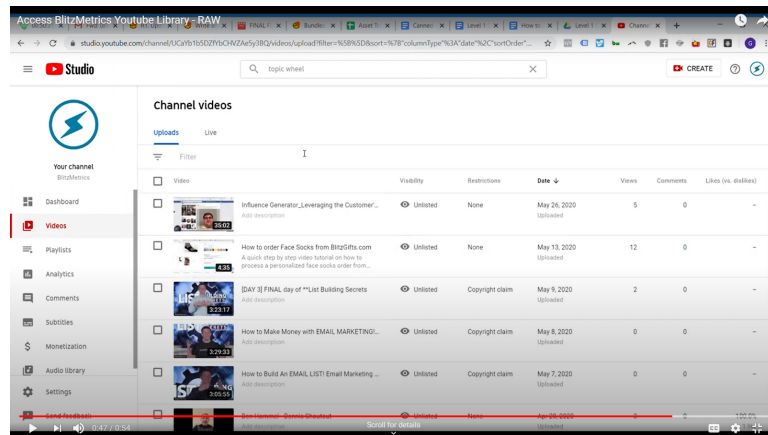
1. Log in to [YouTube](#) with a BlitzMetrics email address.
2. Click on your avatar icon.
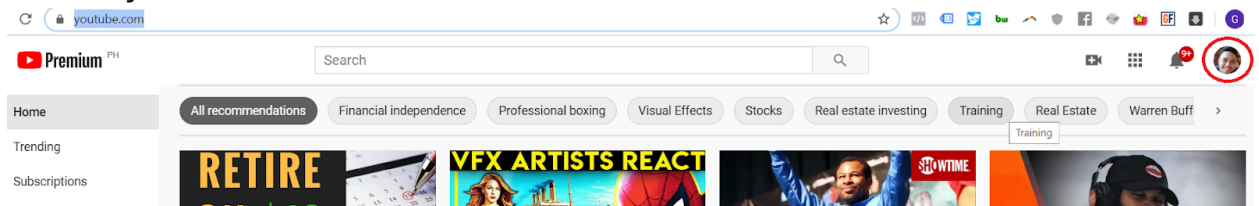
3. Click "Switch Account".
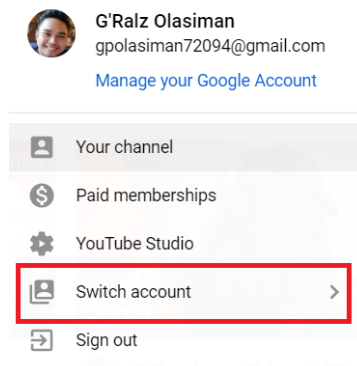
4. Click "BlitzMetrics".

   Once you've chosen BlitzMetrics, you'll now be able to access the full BlitzMetrics video library.

5. Click the BlitzMetrics Icon.
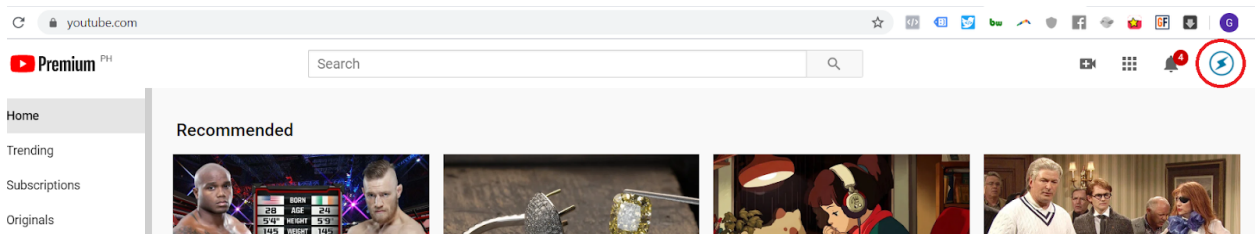
6. Click "Youtube Studio".
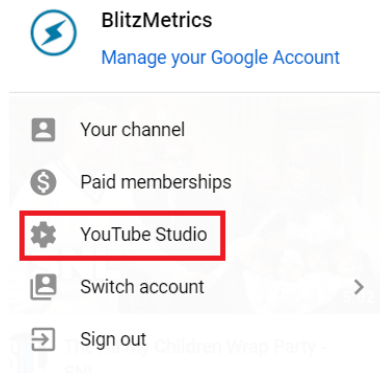
You'll be redirected to the BlitzMetrics Youtube Dashboard.

Six Roles for VAs

SIX ROLES FOR VAs

01

VIDEO EDITOR
-Take raw videos and upload to YouTube library and Content Library.
-Chop them up, edit, caption, effects.
-Load to Facebook in a draft.
-Boost and tune ads based on performance.

02

OPERATIONS SPECIALIST
-Onboard new clients and specialists.
-Handle packages and billing via Infusionsoft.
-Follow up on dropped items.
-Schedule meetings, including reminders.
-Update Operations Process Guide.

03

CONTENT SPECIALIST
-Transcriptions with editorial.
-Manage Quuu submissions.
-Lightweight editorial and coordination-- listicles, interviews, webinar summaries, topic wheels.
-Gather content to assemble Topic Wheel and other components of the client and internal Content Libraries.

04

DESIGNER
-Maintain guide iterations, working with Amir and Ethan.
-Update master asset tracker and list of Infusionsoft landing pages.
-Create client-specific versions, including infographics.

05

COMMUNITY MANAGEMENT
-Lightweight response on Facebook, LinkedIn, blog, Twitter, etc...
-Help users with basic questions-- sending them to relevant articles, videos, courses.
-Manage connection requests for Dennis on Facebook.
-Answer the phone during core hours-- phone number on site, Facebook messenger leads.

06

DASHBOARD ENGINEERING
-Implement plumbing on new client websites.
-Manage IF/THEN triggers in the Logic Builder.
-Configure new websites for clients and specialists (WPMU and integration).
-Update database schema documentation and engineering roadmap.

How To Achieve Individual Effectiveness And Team Effectiveness

[How to achieve individual effectiveness and team effectiveness. Eisenhower Matrix, ducks](#)

[Being an effective project manager by troubleshooting from the Client Tracker](#)

Communication

If you're new to digital marketing, it's quite confusing–so much to learn. Along with that you will encounter new things and digest new material constantly. You should actively learn for our existing training and checklists. However, not 100% of what you need to know is covered in the videos or the articles. We intentionally do not teach every single aspect of every single task, since we don't want to duplicate the entire body of knowledge of digital marketing–just the critical pieces most unique to what we do. While there will always be an unlimited number of topics to study and go into deeper, we also have to see how practically you can get work done–as is typically in most fast-growing companies.

Communication Is Key And To Win We Must Address All Concerns

It's the lifeblood of our success and the pulse for clients. There is never the "taking away" of a lightweight touch… By not delivering our message we hurt their progress and ours.

In general, when you receive an email and you need to reply, if the topic is the same, simply reply to the same email thread.

Start OF Day Reports

1. Verify that the start time of your schedule is accurate in the [Team Roster](#).
2. On the start of your shift, send a Skype message to live:access_268 that says "I am starting my shift".

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End Of Day Reports

Creating End of Day Reports is one of your responsibilities as a team member. Do what you must in order to make sure that you do not miss posting from Monday to Friday. You must start creating End of Day Reports from your starting date and beyond. You can set an alarm at the end of the day, create a daily to-do list, or post a memo near your desk to make sure you always keep them in mind. We post these messages on [Basecamp](#).

Answer the following questions with your top 5 most significant tasks in the "daily-updates" chatbox once per day at the end of your workday. Top 5 means the most important items. So if you're listing 5 random things, instead of the top ones-- we don't understand the value.

1. What I did.
2. What I have to do.
3. What you need from others (Optional)

Make sure to give specifics in your answers to help the team differentiate from your answers in previous days. For example, maybe you uploaded 15 more episodes of a series of videos or let in 3 customers.

This is to ensure that the End of Day Report will be a meaningful exercise instead of pasting in the same functional line items each day-- not useful to you or the team.

What you should not write in an EOD report

1. Managing your emails.
2. Inbox Zero.
3. Answering EOD report
4. Answering SOD report.
5. Most recurring tasks.

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- ➢ Epub & Mobipocket (Exclusive to V.I.P. members)

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