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Ultimate Systems Checklist

WHAT THIS IS FOR:

Ensuring that all relevant and beneficial systems to your business, that would allow it to run more efficiently, are all properly set up and are being used by both you and your team members.

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☐ Payroll Systems:

- **WHAT THIS IS FOR:** Getting your team members paid.

→ **TOOLS WE RECOMMEND FOR THIS:**

- Paypal
- Wise
- Payoneer
- Etc.

NOTES: In our experience, Paypal and Wise tend to be the best and easiest options that work in most cases. If you have one or both of those already setup, you will most likely be able to use them to pay your virtual team unless your virtual team member(s) may request another payment service in the event that those don't work for them.

We recommend setting the expectation to pay your virtual team members once per month in order to reduce the amount of time and work it will take to get them paid.

CLICK HERE AND HERE TO WATCH OUR PAYROLL TRAINING VIDEOS

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☐ Time Tracking Systems

- We Clone You team provides this and shows VA(s) how to use it.

- **WHAT THIS IS FOR:** Keeping track of your team member's hours and activities so you can get them paid and have clarity on the work that is getting done.

→ **TOOLS WE RECOMMEND FOR THIS:**

- Trust method spreadsheet
- Hubstaff tracker

NOTES: On our team, we typically use the trust method and allow our VA's to self-report their hours to us and what they got done in order to get paid. Some of our clients prefer more accountability, in which case, we recommend them to use app.hubstaff.com which allows you to have your team members clock-in/clock-out and even allows for you to have a screenshot taken of their screen every 10 minutes in order to ensure they are doing their job.

CLICK HERE TO WATCH OUR HUBSTAFF TRAINING VIDEO

☐ Passwords & Account Access

- Client responsibility to organize logins for team members.

- **WHAT THIS IS FOR:** Organizing all of your logins so your team members can get access to the various tools and platforms they will be working in on your behalf.

→ **TOOLS WE RECOMMEND FOR THIS:**

- **Login spreadsheet**
- **Or a tool like Lastpass**

NOTES: We typically prefer spreadsheets for simplicity. If you are looking for a great tool, Lastpass is a good one for storing and sharing logins safely. Also, for any tool/service that allows you to add your team members as "users" or "admins", be sure to go that route before sharing logins.

Also, be sure to not share any sensitive login information.

Example: Do not use the same login for your CRM that you use for your bank.

CLICK HERE TO WATCH OUR PASSWORD AND ACCOUNT SHARING TRAINING VIDEO

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☐ Company Email Addresses

-Make one for each VA (Client responsibility to set up).

- **WHAT THIS IS FOR:** Giving your team members a branded company email address they can use which will also make it easier to share and remove access to various platforms and tools you may have.

→ **TOOLS WE RECOMMEND FOR THIS:**

- **Google Workspace**

NOTES: We recommend creating either a *{VA Name}@yourdomain.com* company email address or a department-related email address such as

- *team@yourdomain.com* | • support@yourdomain.com;
- *success@yourdomain.com* | • admin@yourdomain.com;
- *sales@yourdomain.com | etc.*

Once the company email is created, use that to grant your team members access to everything. This makes onboarding much easier, and if you ever have to off-board someone, makes it a lot easier as well.

For VAs: Once you get access to your company email, be sure to add a nice profile photo and email signature that is branded to your client's business.

CLICK HERE TO WATCH OUR COMPANY EMAIL ADDRESS TRAINING VIDEO

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☐ File Management Systems

- For Client & VA to set up and organize if it is not already done.

• **WHAT THIS IS FOR:** Easily organizing and sharing all relevant company files and assets with your team so they can collaborate and use those files to complete projects for your business.

- **TOOLS WE RECOMMEND FOR THIS:**

  - Google Drive
  - Dropbox

NOTES: Ensure all relevant business details and assets that you and your team may need to access now, or at some point in the future for projects, are added and properly organized in your shared drive folders. This can include: logo files, scripts, training resources, SOP's, We recommend Google Drive for the collaboration tools.

CLICK HERE TO WATCH OUR GOOGLE DRIVE ORGANIZATION TRAINING VIDEO

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☐ Team Communication Systems

- For VA to set up if Client does not already have in place.

- **WHAT THIS IS FOR:** Easily communicating and managing your team in an organized fashion. Highly recommended!

→ **TOOLS WE RECOMMEND FOR THIS:**

- Slack

NOTES: We highly recommend having one centralized place where you can manage all communications with your team, delegate projects and see how everything in your business is moving along at a glance. We love Slack and highly recommend it for this. Some other popular platforms that are also good include Discord and Microsoft Teams.

The other benefit of using Slack, besides organization and communication, is that it integrates very well with Zapier so once you have it set up, any relevant automations like lead alerts, payment notifications, agreement notifications, etc. can sync perfectly into your team Slack account.

CLICK HERE TO WATCH OUR SLACK SET UP TRAINING VIDEO

☐ Project Management Systems

- For VA to set up if Client does not already have in place.

- **WHAT THIS IS FOR:** Easily delegating projects to your team and keeping tabs on what is getting done. Also for your team members to add projects to in order to keep track of what they are getting done on your behalf.

→ **TOOLS WE RECOMMEND FOR THIS:**

- Trello
- Clickup
- Asana

NOTES: All these project management tools are pretty much the same. We recommend going with the one that has the best pricing and free plans. If you already have another project management tool set up, it is completely okay to have your team use that instead. This step is highly recommended however as it streamlines project management and organization inside of your business and provides clarity as to what is getting done and what the next steps are for growth.

CLICK HERE TO WATCH OUR PROJECT MANAGEMENT TRAINING VIDEO

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☐ Tracking Systems

- For VA to set up if Client does not already have in place.

- **WHAT THIS IS FOR:** Tracking every relevant key performance indicator inside of your business (from marketing to sales to client delivery to throughput) in order to gain clarity on the biggest bottlenecks and areas of opportunity for improvement.

→ **TOOLS WE RECOMMEND FOR THIS:**

- **Google Sheets**

Copy/paste our tracking sheet templates into your account

NOTES: We offer a lot of tracking sheet templates inside of our members library HERE. As a team member, be sure to watch all of those trainings, set up and start using the tracking sheets on a daily basis.

CLICK HERE TO WATCH OUR TRACKING SHEET TRAINING VIDEOS

☐ CRM Systems

- **WHAT THIS IS FOR:** Ensuring you have the right CRM in place that is a good fit for your business to allow you to scale.

→ **COMMON CRM's WE LIKE:**

- Our own CRM and marketing platform - get 6 months FREE access here
- Follow Up Boss
- Close.io
- Pipedrive
- Many, many, many others

NOTES: Don't get caught up on this step. If you already have a CRM that you love, move onto the next steps. The important thing is not which CRM you use specifically, but making sure it has the following core functionalities:

→ Integrates with Zapier.

→ Has a dialer built-in ideally and allows for outbound and inbound calls/texts.

→ Has a great user interface and easy to use pipelines.

CLICK HERE TO WATCH OUR CRM SYSTEMS TRAINING VIDEO

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☐ Dialer/Company Phone For Team Member(s)

- **WHAT THIS IS FOR:** Ensuring that your team members have access to a company dialer or phone number they can use to complete client success, sales and other tasks that may involve making phone calls and/or SMS texts.

→ TOOLS WE RECOMMEND FOR THIS:

- If your CRM has a built-in dialer already, that is often times best to use first
  - Dialpad
  - Google Voice

NOTES: This is only if you intend to have your virtual team members, who are overseas, make phone calls or text on your behalf. If your CRM already has a built in dialer, we would recommend using that first. If not, check out the other tools above.

CLICK HERE TO WATCH OUR DIALER/COMPANY PHONE TRAINING VIDEO

☐ Legal Agreement Systems

- **WHAT THIS IS FOR:** Ensuring that you have the ideal legal agreement sending software to maximize efficiency in your business.

→ **TOOLS WE RECOMMEND FOR THIS:**

- Pandadoc
- Docusign (Pandadoc is much better)

NOTES: If you already have a legal agreement system that you love, do not worry about switching things over as it can be a hassle. We personally use Pandadoc and love it because it integrates with Zapier and allows you to edit the documents inside of Pandadoc itself without having to export, edit inside of a different application and then reupload. In our business, Pandadoc saves us a lot of time. Whatever legal agreement software you are using, ideally make sure it integrates with Zapier in order to automate important tasks in your business down the road.

CLICK HERE TO WATCH OUR LEGAL AGREEMENT SYSTEM TRAINING VIDEO

☐ VPN's

- For your VA to set up and use.

- **WHAT THIS IS FOR:** This is strictly for the virtual team members to use when logging into certain platforms and services online which may not work without using a VPN.

→ **TOOLS WE RECOMMEND FOR THIS:**

- Vpn-free.pro (Free Solution)
- Mullvad VPN (Paid Solution)

NOTES: For virtual team members: when logging onto certain websites and platforms on behalf of your client, be sure to have a VPN ready in case you need it. Watch the video below for clarity on how to set up and use.

CLICK HERE TO WATCH OUR VPN TRAINING VIDEO

☐ Standard Operating Procedures

- For Client & VA to set up and organize if it is not already done.

- **WHAT THIS IS FOR:** Documenting, with screen recorded video usually, instructions for common procedures inside of your business in order to effectively delegate these to your team.

→ **TOOLS WE RECOMMEND FOR THIS:**

- Loom
- Zoom
- Quicktime

NOTES: Both our clients and their virtual team members are responsible for creating detailed standard operating procedures and organizing them inside of the company's file management system. This is an incredibly important step for your business. What gets made into an SOP can easily be delegated to someone else.

CLICK HERE TO WATCH OUR SOPs TRAINING VIDEO.

☐ Company Employee Card

- For Client to set up - optional but recommended.

- WHAT THIS IS FOR: Allowing your team members to be able to safely spend money on your behalf without sharing your main credit card information with them.

→ TOOLS WE RECOMMEND FOR THIS:

- American Express Business Platinum
- American Express Business Gold

NOTES: If you intend to have your team member(s) spend money on your behalf, for example to order office supplies, meals, client appreciation gifts, etc. this step is highly recommended. If you create an employee card for your team, make sure that you set a safe spending limit on it and get the credit card points in your own account.

We personally like American Express Business Platinum and Business Gold cards as they allow you to easily add free employee cards, set limits, track the spending and more. Most banks and card companies will have good employee card options as well.

CLICK HERE TO WATCH OUR COMPANY EMPLOYEE CARD TRAINING VIDEO

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☐ Automations & Integrations

- For VA to set up at the end once all else is set up and training is complete.

- **WHAT THIS IS FOR:** Setting up advanced automations and integrations inside of your business that leverage technology to complete repetitive tasks for you. This allows for more efficiency, greater savings, greater productivity and less human errors inside of your business.

→ **TOOLS WE RECOMMEND FOR THIS:**

- Zapier

NOTES: Automations and integrations will make your life and business run much more efficiently and with less human error. These are some of the more technical systems and automations for your team member(s) to set up for you once all other relevant systems have been completed along with the automations and integrations training.

CLICK HERE TO WATCH OUR IN-DEPTH AUTOMATIONS AND INTEGRATIONS TRAINING

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☐ AI Integration Tools

-For your VA to set up and use.

- **WHAT THIS IS FOR:** Enabling your team to move faster with the implementation of artificial intelligence tools that act as their side-kicks.

→ TOOLS WE RECOMMEND FOR THIS:

- Chat GPT - AI Assistance
- Descript - Video Editing with AI features
- DALL-E - AI image generator

NOTES: There are lot's of other useful AI tools on the market and more that are consistently being rolled out each month. For the most up to date list, please refer to our library below.

CLICK HERE TO ACCESS OUR LIBRARY OF AI TOOLS RECOMENDATIONS

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