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# New Client Welcome Pack

## 27 March 2015

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## Welcome

[Client's first name], I am genuinely thrilled that we have this opportunity to partner together in business.

It is my personal commitment to provide the best possible service to you as your virtual professional and I am dedicated to making our working relationship a success.

I put tremendous emphasis on providing professional, reliable and high-quality virtual services and place a high level of importance on individual client contact.

This pack is designed to provide an overview of:

1. What we have discussed to date and my understandings of your expectations (in an attempt to avoid any miscommunications).
2. The ways in which I conduct my virtual business taking into account hours of operation and code of conduct.
3. The best ways to contact me during and after office hours.
4. My formal agreement that I send to all clients. It is very important to me that we are both covered should any unforeseen circumstances arise.

I look forward to working with you and am excited to see how I can help you grow your business using a virtual assistant based model.

## About Just in Time Virtual Assistant

Our Vision is to allow practitioners and business owners to focus on what they love.

Our Strengths are

- Commitment to Quality
- Dedication to Continuous Improvement
- Focus on our Customers goals

What we do – Assist businesses with Digital marketing, eNewsletters, blogging, Website management (content, SEO, updates and plugins), Social Media, Lean Process Improvement and Personal Assistant Services

Who we help – Small to Medium Health and Wellness businesses

How we help them – Personalized, tailor-made service to specific goals

Our Specialties – Certified Blog Assistant, Lean Coach

## Project Understanding

### Overview

I will be working with you as xxxxxxxx

Some activities I will be involved in include, but are not limited to:

- Include detailed dot points of your responsibilities with any expected outcomes and timeframe.
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You will [include the clients agreed steps to get started with them]

## Payment Terms

My standard rates are as follows:

1. Expert services in relation to XXXX is charged at \$XXXX (packages available see attachment X)
2. All other services are regularly charged at \$XXXX
3. Automatic rate increases occur each financial year at a minimum rate of 5% or in line with cpi (whichever is greater)

\*We have agreed to an amount of \$ XXXX for an initial period of XXXX and this will be adhered to.

### Initial Deposit

So that I can make a start on your most immediate projects, please deposit \$xxx in my bank account as detailed on my invoice. I have invoiced you accordingly and will continue to do so each [week/month].

### Invoices

Your payment billing cycle is XXXX and payment is made XXXX

We follow a structured invoicing system as follows: (see standard terms re late payments)

\*Following this period we will discuss an alternative model of value-based pricing should this be suitable.

## How I Work

### What you can expect by working with me

I will return all calls and email inquiries within 2 hours during my hours of operation (expecting reasonable use of these communication channels). Preferred communication is via email, Skype or phone.

My official business hours are from 0930-1430 Monday to Friday, however I will make all attempts to make myself available outside these hours when given enough lead in time.

Please note: I have a young family and although they are not at home while I am working, there may be times where I care for them due to illness or unforeseen circumstances. I make every attempt to ensure my workload is not impacted during these times and will communicate with you accordingly.

As I am part of a large supportive network of virtual assistants I do have the option of accessing support during unusual times.

### HOLIDAYS

By default I do not work on public holidays, however I understand that urgencies arise and as such I am happy to negotiate any work that requires completion during these times.

I will advise you if I am not available for extended periods of time, however please be assured that this is unlikely in the next 2-3 months. I may take time off over the Christmas period but I will provide you with at least 4 weeks notice in writing.

### CODE OF CONDUCT

I abide by and agree to the VA Placements code of conduct that covers:

- Respect for person's rights and dignity

Virtual Professionals accord appropriate respect to and promote the development of the fundamental rights, dignity and worth of all people. They respect the rights of individuals to privacy, confidentiality and autonomy, consistent with other obligations and within the law.

- Competence

Virtual Professionals strive to ensure and maintain high standards of competence in their work. They recognise the boundaries of their particular competencies and the limitations of their expertise. They provide only those services and use only those techniques of which they are qualified by education, training or experience.

- Responsibility

Virtual Professionals are aware of their responsibilities to their clients, to the community and to the society in which they work and live. Virtual Professionals

avoid harm and are responsible for their own actions, and assure themselves, as far as possible, that their services are not misused.

- Integrity

Virtual Professionals seek to promote integrity in the virtual assistant industry. Virtual Professionals are honest, fair and respectful of others. They attempt to clarify for relevant parties the roles they are performing and to function appropriately in accordance with those roles.

Any issues arising from the above can be referred to the Professional Standards Panel through [ceo@121temps.info](mailto:ceo@121temps.info)

#### CONTINUAL IMPROVEMENT

- I value your feedback and act on all feedback that our clients provide to us. Please feel free to email any questions or concerns to [rachel@justintimevirtualassistant.com](mailto:rachel@justintimevirtualassistant.com)

## Guarantee

### Confidential service

We understand that you work with personal information and have a duty of care to protect that. We in turn will protect your business and the information you share with us.

### On time completion

We can't call ourselves Just in Time if we're not committed to delivering to your deadline! An agreed deadline will always be set before commencement of each assignment. Small projects are generally completed within 24-48 hours. For larger projects we will provide regular updates at agreed milestones as work progresses. Any threats to completing deadlines will be communicated in a timely manner and a solution sought.

### Communication

We engage in open, transparent two way communication. Just in Time uses email, telephone, SMS, and Skype to communicate with our clients. We will do our best to accommodate any preferred style of communication.

### Quality

Our aim is to complete all projects and assignments at the highest quality level and to exceed your expectations. We constantly strive to Do it Right, Do it Better and Do it Differently.

## Contact points

### Mobile phone:

- 0487 406 236

### Email:

- [rachel@justintimevirtualassistant.com](mailto:rachel@justintimevirtualassistant.com)
- [justintimevirtualassistant@gmail.com](mailto:justintimevirtualassistant@gmail.com)
- All emails responded to within 24 hours respecting reasonable use of this communication channel

**Website:** [justintimevirtualassistant.com](http://justintimevirtualassistant.com)

## Please connect with me through

<b>Skype:</b>	justintime.rachel
<b>Google+:</b>	<a href="https://plus.google.com/u/0/+RachelDoolVA">https://plus.google.com/u/0/+RachelDoolVA</a>
<b>LinkedIn:</b>	<a href="https://www.linkedin.com/in/racheldool">https://www.linkedin.com/in/racheldool</a>
<b>Facebook:</b>	<a href="https://www.facebook.com/JustInTimeVA">https://www.facebook.com/JustInTimeVA</a>
<b>Twitter:</b>	<a href="https://twitter.com/justintimeVA">https://twitter.com/justintimeVA</a>
<b>Pinterest:</b>	<a href="https://www.pinterest.com/JustInTimeVA/">https://www.pinterest.com/JustInTimeVA/</a>

For all our retainer clients we promote and mention their services throughout our social media network as a value added service.



## Agreement for Supply of Virtual Services

CONFIDENTIAL – this document should not be forwarded, duplicated or replicated in any way without the express written authority of Just in Time Virtual Assistant

Please note that our standard terms apply - included.

Virtual Assistant	Just In Time Virtual Assistant ABN 72 287 583 850 (“the VA”)
Address	96 King Street
Contact Person	Rachel Dool
Daytime Contact Number	0487 406 236
Email Address	rachel@justintimevirtualassistant.com

Client	ABN	(“The Client”)
Address		
Contact Person		
Daytime Contact Number		
Email Address		

The client has retained the VA to provide the services as outlined in the Client Welcome Pack.

Please note we are not registered for GST.

We increase our prices in accordance with CPI annually (or 5% whichever is greater) and this increase will automatically occur at the start of each financial year.

Client Signature:

Signed:

Name & position:

Date:

/ /

**It is further acknowledged that:**

1. The VA shall be deemed an independent Virtual Business Owner and is not an employee, partner, agent or engaged in a joint venture with and does not have any interest in the Client’s business.
- 2.

3. The VA agrees to uphold the VA Placements Code of Conduct and acknowledges that a breach of the Code of Conduct will be considered serious misconduct and may lead to termination of this agreement.
4. Office hours are 0900 through 1430 Monday to Friday. Email is to be the primary form of communication between Client and VA. The VA is available for phone calls during office hours only. The Client may text the VA for emergency purposes. Occasional calls of only a few minutes in duration are not typically billed to the Client. However, the time of both parties must be respected, and calls lasting over 10 minutes may be billed to Client if agreed to by both parties at the time of the call.
5. The Client warrants that:
  - a. He/She is not an undischarged bankrupt
  - b. He/She holds and will continue to hold and keep public liability insurance.
  - c. He/She will be personally responsible for the nature, quality and presentation of work or services provided directly to their own clients

## STANDARD TERMS

### 1 Offer and acceptance

1.1 Our terms of engagement are made up of these standard terms, and form an offer to enter into an agreement with you regarding the services to be provided to you. If you accept this offer you will be bound by the terms and conditions of the agreement.

1.2 Acceptance may be by:

- 1.2.1 signing and returning a copy of this document,
- 1.2.2 giving us instructions to proceed after receiving this document,
- 1.2.3 contacting us and advising of your acceptance, or
- 1.2.4 paying to us the amount requested.

### 2 Term of agreement

This agreement will remain in place until such time that it is

terminated by you in writing or until such time that the VA terminates the agreement.

### 3 Termination

The VA may terminate this Agreement at any time. In addition, if the Client is convicted of any crime or offense, fails or refuses to comply with the written policies or reasonable directive of the VA, is guilty of serious misconduct in connection with performance hereunder, or materially breaches provisions of this Agreement, the VA at any time may terminate this agreement immediately and without prior written notice to the Client.

### 4 Limitation of Liability

The VA, and its consultants, partners, agents and employees, shall not be liable to the Client, whether jointly, severally or individually, in excess of the compensation paid to the VA under this Agreement, as a result

of any act or omission not amounting to a willful or intentional wrong.

**5 Limitation of Liability for Consequential Damage**

Client hereby agrees that to the fullest extent permitted by law, The VA shall not be liable to the Client for any special, indirect or consequential damages whatsoever, whether caused by the VA's negligence, errors, omissions, strict liability, breach of contract, breach of warranty or other cause or causes whatsoever, including but not limited to, loss of use of equipment or facility, and loss of profits or revenue

**6 Accuracy of Information**

The Client agrees that the accuracy of information supplied to the VA is the sole responsibility of the Client, and that the VA is not responsible and shall not be held liable for the results of services performed on the basis of inaccurate, incomplete or untruthful information furnished by The Client.

**7 Confidentiality**

The VA acknowledges that he/she may have access to and become acquainted with various trade secrets, inventions, innovations, processes, information, records and specifications owned or licensed by The Client and/or used by the Client, in connection with the

operation of its business. The VA agrees that he/she will not disclose any of the aforesaid, directly or indirectly, or use any of them in any manner, either during the term of this Agreement or at any time thereafter, except as required in the course of this relationship with the Client. All files, records, documents, blueprints, specifications, information, letters, notes, media lists, original artwork/creative, notebooks, courses, webinar recordings, templates, guides and similar items relating to the business of the Client, coming into his or her possession, shall remain the exclusive property of the original owner. The VA shall not retain any copies of the foregoing without the Client's prior written permission. Upon the expiration or earlier termination of this Agreement, or whenever requested by the Client, the VA shall immediately deliver to the Client all such files, records, documents, specifications, information, and other items in his or her possession or under his or her control. The VA further agrees that he/she shall at all times preserve the confidential nature of his or her relationship to the Client and of the services hereunder. On termination of this agreement, the VA shall destroy all redundant material that has been supplied to the Client.

**8 Conflicts of Interest**  
The Client represents that he/she is free to enter into this Agreement and that this engagement does not violate the terms of any agreement between the Client and any third party. Further, the VA shall not utilise any invention, discovery, development, improvement, innovation, or trade secret in which he or she does not have a proprietary interest. During the term of this agreement, The VA shall devote as much of their productive time, energy and abilities to the performance of their duties as is necessary to perform the required duties to the Client in a timely and productive manner. The VA is expressly free to perform services for other parties while performing services for the Client.

**9 Payments**  
The VA will provide Business Services to The Client at an agreed charge of \$40 hourly, with a deposit of \$ paid in advance. Billing is a monthly cycle with payment made within 7 days. The payment must be made in the form of direct debit. The VA can revise and negotiate the rate as deemed necessary once the details of the role have been clearly ascertained.

**10 Late Payments**  
In the event that the Client has an outstanding payment that goes beyond a reasonable time,

as determined by the VA, the VA will cease all services and this agreement will be placed “on hold” until the Client has paid the total amount owed.

**11 Successors and Assigns**  
All of the provisions of this Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective heirs, if any, successors, and assigns.

**12 Choice of Law**  
The laws of the state of Qld shall govern the validity of this Agreement, the construction of its terms and the interpretation of the rights and duties of the parties hereto.

**13 Entire Agreements**  
This contract contains the entire agreement between the parties with respect to its subject matter and supersedes all prior

**14 Inventions**  
Any and all inventions, discoveries, developments and innovations conceived by the VA during engagement relative to the requirements under this Agreement shall be the exclusive property of the Client; and the VA Partner hereby assigns all right, title, and interest in the same to the Client.

**15 Refunds and Cancellations**  
By confirming this agreement, the Client is committing to complete all payments due. No refunds will be given and full payment is required for any

outstanding amounts on termination of this contract for any reason.

The contract shall not be modified, amended or supplemented except by an instrument in writing duly executed by the parties. In any

event, these standard terms will apply to any additional work.

**16**

**Dispute Resolution**

Any controversies arising out of the terms of this Agreement or its interpretation shall be settled in accordance with the rules of the Institute of Arbitrators and Mediators, Australia

## Attachment 1: Technology

List the technology you use and include your backup system, file retention policy and anti-virus.

### **File Backup:**

DropboxOne  
OneDrive  
Google Drive

### **Anti-Virus**

Avast! Protects all files, emails and attachments as well as spyware and malware. I use "safemode" when accessing banking or paypal sites.

I have a policy to never open emails or attachments from people I don't know and exercise caution at all other times. I will never open .exe or other scripting file extensions.

### **Passwords**

I use LastPass to store all passwords securely and the password to open the program is written down (not saved on my computer)

### **Project Management**

I use Trello for simple projects and to keep track of all my client notes and instructions. This can be shared with you if you so choose.

### **Remote Access**

If there is a need I can access a computer remotely. I use Teamviewer for this and to be able to do this you need to install Teamview on each computer that needs to be shared.

### **Shared Calendar**

I use Google Calendar to share calendars.

### **Task/Time management**

I track all clients work using an Excel spreadsheet and a report can be provided with each invoice on request.

## Attachment 2: Professional Development

Membership

**121 Temps and VA Placements** (see code of conduct)

[www.121temps.com](http://www.121temps.com) | [www.vaplacements.com](http://www.vaplacements.com)



**Australian Association of Virtual Industry Professionals**

[www.virtual.asn.au](http://www.virtual.asn.au)

### Professional Development Record

Name of Course	Date	Completed/in progress
Marketing education course	April 2014	Completed
Blog Assistants Course	August 2014	Completed
Ongoing continuing education		In progress

### Testimonials



**Judy MacDonnell**  
Physiotherapist

Rachel is efficient, friendly and always courteous. I've been impressed with how she gets things done and manages people and would recommend her to anyone looking for someone to market their business. [View ↓](#)



**Stephanie van Doorn**  
Lean Director, Europe at Nike



“ During the 18months I was Rachels Lean Coach at Nike, Rachel progressed through her lean journey with vigour and has not been afraid to challenge herself to broaden her experience and lean knowledge. Rachel is open and receptive, results orientated and works well within cross functional project teams (either as the lead, or participant). Please contact me if you require more details. **less** ”

May 2, 2011, Stephanie worked with Rachel at Nike European Operations BV



**Anouk Kreek**  
Western Europe Go To Market Manager



“ Rachel is an allround professional with highly developed project management skills and outstanding knowledge in office, service and process management. She is a multifunctional generalist with an excellent eye for detail and has high quality standards. Having followed the Nike Lean Coaching program she uses this knowledge in a variety of projects and process improvement initiatives that result in immediate positive effects. She thinks very logical, is flexible and always willing to think with you. She is highly recommended by her colleagues and very easy to work with. I rate her very highly and was very sorry to see such a valuable team member and contributor leave the company. **less** ”

April 29, 2011, Anouk managed Rachel at Nike European Operations BV