YOUR VIRTUAL ASSIST

CAPABILITIES DECK

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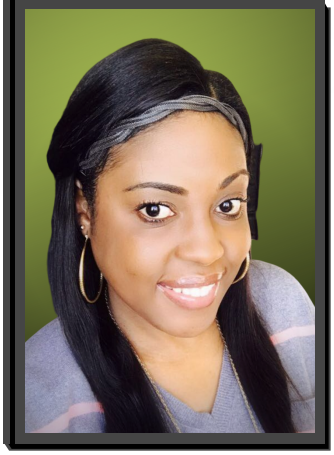


My name is Donna Lyttle and I am the Owner of Your Virtual Assist. I partner with Life Insurance Agents and Agencies as their virtual executive assistant to help them grow their business by providing administrative support, business development, and customer management.Drawing from my 9 years of experience as an office administrator for a life insurance agency, I know what it takes to manage a thriving agency, as well as, grow and maintain a profitable book of business. I understand that selling life insurance is not just about getting clients approved for a policy but providing a legacy and wealth generation for their families.Through my company, I am able to help agents provide consistent and reliable customer service to their clients, while also helping them double and in some cases triple their income potential because of the support I provide.In addition to my experience, I hold a BSc in Public Administration from the University of the West Indies and also completed course work in Business Communication from the University of Alabama. I hold a Quickbooks Certification and am trained to manage the monthly bookkeeping needs of your agency.

Contact me if you are ready to have more time to help more clients.

LET'S WORK TOGETHER!!

PROCESSES

Below is a breakdown of operation systems that I am proficient in.

ADMINISTRATIVE SUPPORT

- o Email Management & Correspondence
- o Scheduling and Calendar Management
- o Electronic Filing and Management
- o Online Research
- o Travel Arrangements
- o Inventory Management
- o Sourcing & Ordering
- o Presentation Creation
- o Payroll Management

BOOKKEEPING

- o Account Receivable
- o Account Payable
- o Invoicing
- o Account Reconciliation into QuickBooks

PROCESSES:

BUSINESS DEVELOPMENT

o CRM's
o Follow Up Calls
o Customer Service
o Proposal Creation
o Contract Creation

BACK OFFICE SUPPORT

o Screen, quality control L&C paperwork and New Business
o Submit all L&C applications and required New Business
o Provide pending case management services
o Provide case design and illustration support

SOCIAL MEDIA MANAGEMENT

o Graphic Creation
  Memes
  Headers - Social
  Media Account Headers – Newsletter
  Featured Images
o Setting Up Social Media Accounts – For Business Instagram
  LinkedIn
  Facebook

SYSTEMS

Knowing how to efficiently use all the amazing technology at our disposal is key to successful operations in my line of business.

CRM's

- o Salesforce
- o Siebel

Communication- Chat

- o #Slack
- o WhatsApp
- o Google Voice
- o Google Hangout
- o Zoom Conference
- o Skype
- o BlueJeans

Email& Calendar

- o Outlook
- o Gmail
- o Microsoft365
- o Calendly
- oNetwork Solutions

Communication – Email Marketing

- o MailChimp

Project Management

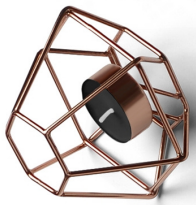
- o Microsoft Team

Financial

- o QuickBooks Certified
- o PayPal
- o Square
- o CashApp
- o Google Pay

Social Media

- oFacebook
- oTwitter
- o Snapchat
- oInstagram
- oBuffer
- oPlanoly



Creative Tools

- o Canva
- o Adobe

Website Management

- o Wix
- o GoDaddy

Storage

- o Google Drive
- o One Drive
- o Dropbox

NEXT STEPS...

Thank you for reviewing my capabilities deck. I look forward to connecting with you and being of support. Be sure to book your discovery call.

Until then, keep being awesome!!

Let's stay connected

@your_virtual_assist

@Donnalyttle

@helpmevirtually