



Erica Beale: Virtual Assistant
Virtually Yours

Need Assessment Form

Thank you so much for your interest in my services. While I have a list of options available on my website, you may have other needs I'd be happy to meet. Please use this form to let me know exactly what you are interested in.

Name: _____
Email address: _____
Secondary point of contact (optional): _____
Business type: _____
Website: _____

Here is a list of services I'm primarily offering:

Customer Service and General Office

- Answer emails/respond to your clients in a timely manner.
- Contact clients via phone or email to arrange meetings.
- Create or update manuals, office training materials, or other out-of-date paperwork.

Social media

- Create social media profiles or maintain current ones.
- Promote your blog posts via social media and/or newsletter.
- Respond to comments and messages.
- Enhance you online presence.

Blogging (WordPress only at this time)

- Keep WordPress up-to-date.
- Keep plug-ins up-to-date.
- Maintain posting calendar.

Content Managing

- Proofread and edit content as needed
- Reach out to others in your niche for potential guest posting opportunities.

Meeting your needs

Please let me know what services you are interested in, even if it is not on this list above.

What area(s) of your blog/site do you feel you need most help with?

continued

What are your main goals of your business?

Are you utilizing any social media accounts? _____

If yes, which ones? ___Facebook ___Twitter ___Pinterest ___Google+ ___LinkedIn ___Other

How often do you post or make updates? _____

Are you currently utilizing a blog? _____

If so, how often do you post? _____

Do you maintain a posting schedule? _____

Are there any other requests you may have in regards to having a virtual assistant?

Once you have completed this form, please email it back to me at info@ericabeale.com. I will be in contact with you within 48hrs. Thank you again for your interest!

Virtually yours,
Erica Beale