Trained Virtual Assistants
https://trainedvirtualassistants.com/

Welcome to
Trained Virtual Assistants

*****Important, If you want help with any of these tasks, either for yourself or your employees/VA's we put together a training manual for all the tasks listed below. If you want access to the employee handbook/training manual, you can order it here: CLICK HERE FOR PRICING AND ORDERING*****

EVERY PROFESSIONAL NEEDS AN ASSISTANT

Why Have Your Own Virtual Assistant?

Let's face it, your business is growing and you are finding it harder and harder to do every single task by yourself. Your job is to sell, bring money in for your business, and make your business grow. Not answer the phones, data entry, scheduling appointments, or other admin work - although necessary, tasks that don't make you any money.

Why Hire a Trained Virtual Assistant?

Hiring, recruiting and training someone by yourself is difficult. People Quit, don't want to work, and have to be managed every single day. You don't have time for that! You need to spend your time doing what you do best, not hiring people, firing people, payroll, and managing personalities.

OUR SERVICES:

Inbound and Outbound calls

Our VAs can answer the phone, schedule appointments, qualify prospects and transfer them to your agents.

Lead Qualifying

Spot check leads submitted by lead vendors/telemarketers and make follow up calls to qualify.

Dialer Maintenance

Creating playlists, caller IDs, adjusting dialer speed, making reports.

Data Pulling

Pulling of data, creating reports and uploading into various CRMs and systems

Monitor Telemarketers

Be their accountability partner. From call listening, coaching, payroll, etc.

Commission Computing

Create a sheet for each company, consolidate and track real-time commission amounts.

Scheduling Appointments

The VA will manage all your appointments from attending an event to a client call or meeting.

Policy Tracking

Verifying that you have the right policy for each of your clients.

Seminars for Agents

We train our VAs to confirm venues for events and call attendees to make sure they RSVP.

Social Media Management

Creating posts and engaging with your followers on different social media platforms.

CRM to CRM Data Transfer

Transferring of client's info, commission report, or any other data from one CRM to another.

Graphic Design

Knowledgeable with a number of graphic design tools such as Canva, Adobe Photoshop, Gimp, Pixlr, etc.

Follow up Calls

Reaching out to old leads/prospects and setting appointments for them to sign up.

Live Transfers to Agents

Calling leads, find out if they're interested then qualify. If eligible, live transfer to an available agent.

Confirmation Calls

Following up on people who reserved a spot for an agent's seminar and/or if they want to reschedule.

CRM Sequencing

Setting up client's CRM with pipelines, stages and workflows.

Prescription Search

Assisting agents in identifying, verifying and comparing prescription drugs for active clients through Medicare.gov, Sunfire, etc.

Book of Business Management

Organizing agents Book of Business from data migration, research, follow-ups, client info update, etc.

Look Up Doctors

Assisting agents in identifying, verifying and comparing prescription drugs for active clients through Medicare.gov, Sunfire, etc.

Assist Agents Prior Appointments

Helping agents with detailed notes, documents, client’s requests, etc prior the appointment.

Follow Up with Carriers

Reaching out to each carrier site (Individual, PDPs, Med Supp, Dental) for policy approvals, etc.

AgencyBloc Renewals

Pulling monthly reports from AgencyBloc and/or other CRMs for each carriers.

Facebook Leads Outreach

Pulling leads from Facebook and calling them to gather information, qualify eligibility and set appointments.

Mailers

Creating, editing and sending of brochures, pamphlets and other marketing materials.

Carrier Sites Regular Check

Going through every carrier sites for new clients/enrollees, updates on status, information, etc.

File Conversion

Changing one file/document into other file formats or types.

Cloud Storage Management

Sorting through all clients files, managing folders, downloading/uploading and organization in Outlook, Google Drive, Dropbox, etc.

TOOLS

All our VAs are trained on how to use a variety of CRMs and Dialers. They are also familiar with most companies and on how to navigate through each carrier site. Depending on your business needs, here are several tools our VAs are familiar and trained to use:

Carrier Sites

- ▢ **Aetna (Medicare Advantage and Supplement Plan)**
- ▢ **Cigna**
- ▢ **Mutual of Omaha**
- ▢ **Blueshield CA**
- ▢ **UHC**
- ▢ **BCBS**
- ▢ **United Healthcare**
- ▢ **Plus more...**

CRMs

- ▢ **RadiusBob**
- ▢ **DFY CRM**
- ▢ **GoGuru**
- ▢ **MedicarePro**
- ▢ **AgencyBloc**
- ▢ **SuiteCRM**
- ▢ **SunFire**
- ▢ **Plus more**

Dialers

- ReadyMode (Xencall)
- Nextiva
- RingCentral
- Five9
- Prospect Boss (SalesDialers)
- Call Tools
- Office Ring
- Mojo
- Zoom Phone
- Skype Call
- GrassHopper
- OneTalk
- Plus more

Social Media

- Facebook
- Twitter
- LinkedIn
- WordPress
- Youtube
- Instagram
- TikTok

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