



PROPOSAL KIT SAMPLE

Executive Personal Assistant Sample Proposal

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Scott Endersley
Owner
Custom Cardboard Products
1258 New State
Renton, WA 98005

Dear Mr. Endersley,

Congratulations on starting your new business!

We know that every new organization can't hire all the permanent help they need. We're here to help.

When U Need Us Virtual Assistance can provide a wide variety of clerical and expert services that can help your business compete and thrive. And you pay only for what you use.

Never heard of virtual assistance? Take a look at the enclosed information. We think you'll be amazed at what we can do for you.

I'll call you in a week or so to discuss which virtual assistance services you may need and answer any questions you may have at that time. I look forward to speaking with you soon.

Sincerely,

Gina Smith
Client Outreach
When U Need Us Virtual Assistance
206-555-6000
gina@WhenUNeedUs.com
www.WhenUNeedUs.com



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INTRODUCTION

Busy executives, especially those involved in startup businesses, need assistance every day but often cannot afford to hire the services of a qualified full-time executive assistant.

The solution? Our virtual executive assistants are there when you need them, and can be working for others when you don't. You pay only for the services you need, and you can contract with us by the hour or with a pre-paid monthly package.

Our team members at When U Need Us Virtual Assistance are trained and experienced in all the skills any busy office needs. We can handle any task from routine bookkeeping and scheduling tasks to daily social media postings.



RESUME

We'd like to introduce the following When U Need Us Virtual Assistance team members, who are available to work with you on your projects. Depending on your needs and the amount of assistance you require, you may be paired with one assistant, or work with a variety. Rest assured that each of our clients will be assigned one contact person—we are here to make your life easier!

The following individuals are only a partial representation of our virtual assistants.

→ **Paul Theron**

Basic Skills: Bookkeeping, Appointment Calendar Management, Email Management, Correspondence

Special Skills: Presentation Development (PowerPoint), Facilitation of Skype, Google, and other face-to-face teleconferencing meetings

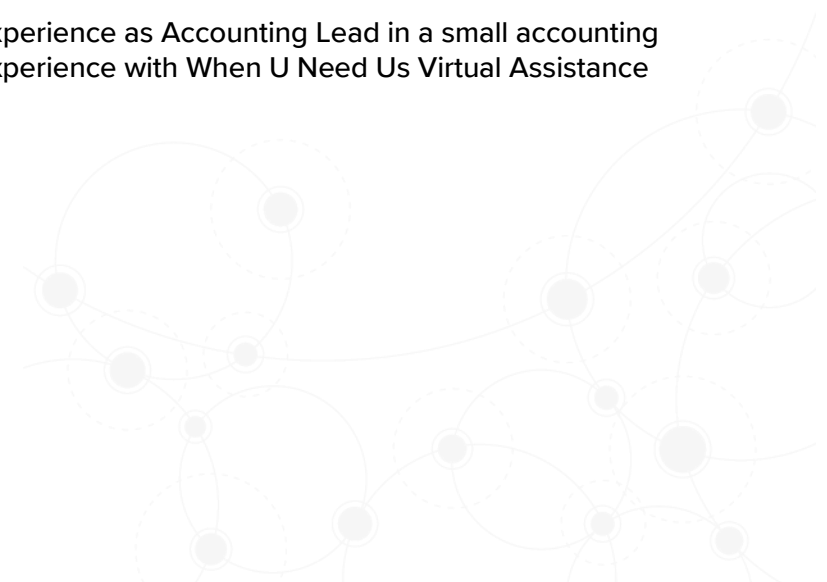
Experience: Six years experience as shared Executive Assistant for a major corporation, four years experience with When U Need Us Virtual Assistance

→ **Janece Valuto**

Basic Skills: Basic Bookkeeping, Appointment Calendar Management, Email Management, Correspondence

Special Skills: Quarterly and Annual Tax Preparation, Payroll, HR Recordkeeping

Experience: Eight years experience as Accounting Lead in a small accounting services firm, two years experience with When U Need Us Virtual Assistance



→ **Emilio Martinez**

Basic Skills: Basic Bookkeeping, Appointment Calendar Management, Email Management, Correspondence

Special Skills: Written and spoken Spanish and Portuguese, Database Entry and Query, Spreadsheet Design and Maintenance

Experience: Two years experience as Office Manager, Modern Language Dept of WWU, two years experience with When U Need Us Virtual Assistance

→ **Brittany Willerbee**

Basic Skills: Appointment Calendar Management, Email Management, Correspondence

Special Skills: Social Media Management and Postings in All Its Forms: Facebook, Twitter, Google Plus, Snapchat, Pinterest, etc.

Experience: Three years experience with When U Need Us Virtual Assistance

→ **Hailey Carson**

Basic Skills: Bookkeeping, Appointment Calendar Management, Email Management, Correspondence

Special Skills: Presentation Assistance with PowerPoint, Video Creation and Postings, Social Media Management using Facebook, Twitter, Google Plus, Pinterest, etc.

Experience: Four years experience with When U Need Us Virtual Assistance



➔ **Casey Scott**

Basic Skills: Appointment Calendar Management, Email Management, Correspondence

Special Skills: Online Research of All Kinds, Statistical Analysis, Tracking Industry News

Experience: Formerly in the U.S. Navy, three years experience with When U Need Us Virtual Assistance

➔ **Taylor George**

Basic Skills: Appointment Calendar Management, Email Management, Correspondence

Special Skills: Website Design, Development and Maintenance, HTML coding

Experience: Four years experience with When U Need Us Virtual Assistance

Summary

We are always adding new assistants all around the country, both full-time and part-time, so if you require a special skill to assist in your work, just ask—odds are that someone on our staff can meet your needs.



EXPERIENCE

We are here to help with your needs, whether they be small repetitive daily tasks or major undertakings. The following is a list of a few of the tasks we have performed for our clients.

→ **Major Conference Organization and Preparation**

We have organized business conferences for up to 720 attendees. This has included researching and reserving venues; hiring caterers; scheduling speakers and entertainment; developing, printing, and distributing advertising materials and attendee handouts, and so much more.

→ **Online Teleconferencing**

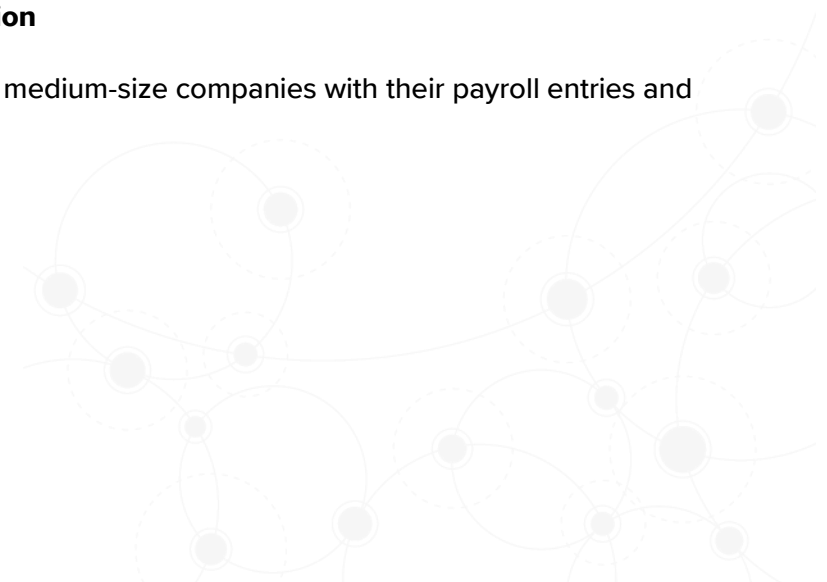
We have assisted our clients in planning, developing, and presenting teleconferences using a variety of media, from simple Skype face-to-face meetings to dial-in teleconferences that include dozens of parties from around the world.

→ **Printing and Distribution Services**

Not only can we help you write your pamphlet or brochure, we can oversee the printing and distribution, too. We work with a variety of print experts, so we can put together the package you need for minimal cost.

→ **Payroll and Tax Preparation**

We have assisted small to medium-size companies with their payroll entries and periodic tax documents.



➔ **Email Management and Services**

We can sort and manage your daily email to save you time. We can also help develop customer lists and send email bursts to aid in your marketing efforts.

➔ **Social Media**

No company can afford to be without a social media presence these days, but keeping all the sites active is a time-consuming task. We help with website development and maintenance, and with Facebook, Twitter, Pinterest, Google Plus, and other social media postings. A much-requested service from us these days is social media research to pinpoint what is trending and who views what where.

Summary

We are constantly updating our skills to keep up with the changing business world. If you need something special not listed above, just ask!



RELIABILITY

We understand that with the internet, doing business these days can be a 24/7 commitment.

Although not all virtual assistants can be available around the clock, we can always provide someone to help. We employ virtual assistants in every time zone across the United States, and we have partnership agreements with sister companies in other countries, so we're always here for you.

With our flexible structure, we can add or shrink the staff members committed to your project, and you'll pay only for services you use.

We strive to meet your deadlines, no matter how soon they might be. If we fall short on a promise we have made, you'll get a credit for future services on your account.



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- 3) Select the title of this (or any other) sample and click the Import Content from Selected Sample button.
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