



THE POCKET SECRETARY
CHLOE FRIESEN
VIRTUAL ASSISTANT

Service Provider:

Chloe Friesen, VA.
The Pocket Secretary,
Operating as a Sole Proprietor.
Aylmer, Ontario, Canada.

Package 2:

Business Support Plus +

Most popular option.

Response time: 24 business hours.

Includes:

- 30 hours/month
- Administrative support.
- CRM Updates.
- Inbox & calendar management.
- Customer support (None verbal.)
- Data entry & document formatting.
- Light bookkeeping. (Keeping documents and such organized.)
- Social media scheduling + posting . (client provides content.)
- Priority task handling.
- Weekly check-in / report / delegate.

THE POCKET SECRETARY | VIRTUAL ASSISTANT PACKAGES

Package 2:

Business Support Plus + (breakdown.)

Includes:

30 hours/month:

- For 30 hours a month I focus on you and only you. We can discuss what time of day you'd like me to reach out to your customers and exc. My hours are *Monday - Friday 9 a.m. - 4:00 p.m.*

Administration support:

- Organization & Scheduling:
 - Managing calendars, organizing files, Customer record management.
- CRM Update's:
 - Logging Interactions: Recording every touchpoint within the client's profile in systems like HubSpot, Salesforce, or Zoho.
- Data & Document Management:
 - Entering data, updating records, creating reports, maintaining databases, printing/photocopying, document creation. (Google Docs, Microsoft Word exc.)
- Priority task handling:
 - I handle the most important tasks in the beginning of the work month/week so you can expect reduced overwhelm, effective time management, & immediate turnaround.
- Social media scheduling + posting_ (client provides content.)
 - I will develop a schedule and publish your content accordingly to ensure consistency across your social media platforms.

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Package 2:

Business Support Plus + (breakdown.)

Continued:

Light Book Keeping:

Please Note: **Organization ONLY**, does not include tax filing or financial advising.
(Full bookkeeping will be available soon!)

Data Entry, accounts Receivable (Invoicing), accounts Payable (Bills), Expense Tracking, Software Management: (Proficient in QuickBooks, and Wave.)

Customer support (None Verbal.)

- Correspondence with customers/clients through email.
- Social Media DMs: Responding to inquiries on Instagram, Facebook Messenger, X (Twitter), or TikTok.
- SMS/WhatsApp: Handling customer queries via text messaging apps.

Weekly check-in / report / delegate: (Included in the 30 hrs)

We will schedule a Zoom meeting or phone call to provide a comprehensive update on all activities and developments from the past two weeks, ensuring you remain informed. During the meeting, we will also discuss key priorities for the upcoming week/s.

Topics that will be discussed via the meeting:

1. *Past - Overview of the previous week's.*
2. *Present - The Current Workflow.*
3. *Future - Adjustment & Growth.*

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PACKAGE PRICING

Introductory Rate / 1st Month :

Price: \$35.00 CAD / hr

- 30 hrs per month.

Price: \$1050.00 CAD / month. + TAX.

On - going monthly rate:

Price: \$40 CAD / hr

- 30 hrs per month.

Price: \$1200.00 CAD / month. + TAX.

PACKAGE BOUNDARIES/ DISCLAIMERS

- **Monthly hours DO NOT roll over.** (Unless a mutual agreement was made at the beginning of the months for an additional cost. See below for add on pricing.)
- **Bookkeeping = Organization ONLY.**
Does not include tax filing or financial advising.
- **No phone/video calls unless scheduled.** (However please feel free to email me at any time. My response time for this package is 24 business hours.)
- **Social media = scheduling + Posting ONLY. (NO content creation.)**
- **Client must provide software/subscriptions.**
(Virtual Assistant is not responsible for paying for software/subscriptions fees.)
- **Client must be willing to provide clarification when needed.**
- **The client will be required to provide the VA with a comprehensive overview of business workflows, customer response procedures, and relevant materials to facilitate a seamless onboarding process.**

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PRIVACY & TRUST

Your privacy is the cornerstone of our partnership. I operate with a 'Discretion-First' philosophy, ensuring that all sensitive information—from financial data to personal family schedules—is handled with the highest level of confidentiality. To guarantee your security, I utilize bank-grade encryption tools like 1Password for credential sharing and am fully prepared to sign a comprehensive Non-Disclosure Agreement (NDA) before our first session. My goal is to be a seamless, invisible extension of your life, providing you with total peace of mind that your private affairs remain exactly that: private."