



THE POCKET SECRETARY  
CHLOE FRIESEN  
VIRTUAL ASSISTANT

**Service Provider:**

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

**Package 3:**

**Full-Service VA Support.**

For owners who want to be hands-off  
**Response time: Same-day (business hours.)**

**Includes:**

- 45 hours/month
- Full admin + customer support management.
- Inbox & calendar management.
- CRM updates and customer record management.
- Data entry & document formatting.
- Executive/Project Support.
- Light bookkeeping. (Keeping documents and such organized.)
- Social media scheduling + posting . (client provides content.)
- Light Personal assistant tasks.
- Priority task handling.
- Weekly check-in / report / delegate.



# THE POCKET SECRETARY | VIRTUAL ASSISTANT PACKAGES

## **Package 3:**

### **Full-Service VA Support.**

#### **Includes:**

#### **45 hours/month:**

- For 45 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, CRM updates, Customer record management, meeting arrangements, and customer appointment scheduling.
- CRM updates and customer record management:
  - Lead Tracking and Pipeline Management, Automation Setup and Maintenance, Reporting and Analytics, 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.

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## **Package 3:**

### **Full-Service VA Support.**

Continued:

#### **Customer support (None Verbal.)**

(Please Note: No phone/video calls will be made with customers/clients.)

- 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.

#### **Light Book Keeping:**

(Please Note: Organization ONLY, does not include tax filing or financial advising.)

- Data Entry, Bank Reconciliation, accounts Receivable (Invoicing), accounts Payable (Bills), Expense Tracking, Basic Reporting, Payment processing, refund processing, Software Management (Proficient in QuickBooks.)

#### **Social media scheduling + posting .**

(Please Note: Client provides content. Virtual Assistant **does not do ANY** content creation.)

- Use Scheduling Tools, Set the Schedule, Platform Formatting, Consistency Checks, Basic Management.

#### **Light Personal Assistant Tasks.**

- Travel and Trip Planning, Research and Recommendations.



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## **Package 3:**

### **Full-Service VA Support.**

#### **Continued:**

#### **Weekly check-in / report / delegate: (Included in the 45 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.*

## **PACKAGE PRICING**

### **Introductory Rate / 1st Month :**

Price: \$40.00 CAD / hr  
- 45 hrs per month.  
Price: \$1800.00 CAD / month. + TAX.

### **On - going monthly rate:**

Price: \$45 CAD / hr  
- 45 hrs per month.  
Price: \$2025.00 CAD / month. + TAX.



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## PACKAGE BOUNDARIES/ DISCLAIMERS

- **Monthly hours DO NOT roll over.** (Unless requested at the beginning of the months for an additional cost. See below for add on pricing.)
- **Bookkeeping = Organization ONLY. (Coming soon!)**  
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.