### A Field Guide To THE VIRTUAL OFFICE

## **PATLive**



#### INTRO

#### How Technology Transforms the Traditional Office

Technology has given us more freedom than ever before. You can run a business from your back porch as long as you have a few key essential tools at your disposal; even if you have only the internet and a laptop, your office can be anywhere.

With businesses moving to a remote model on a permanent basis, there are a few things you're going to need to run a successful virtual office today.



#### **BUT FIRST...**

#### What exactly is a virtual office?

A virtual office is a place — any place — that you can accomplish things for your customers, clients, or colleagues. It might be your kitchen table, your car, the coffee shop down the street, or a rented room.

The point is, many small business owners and entrepreneurs have neither the desire nor the opportunity to work in a central office every day. Whether you are a plumber who makes house calls or a website developer with a handful of clients, you work in the place and time that works best for you and your clients.





# 10 Items Every VIRTUAL OFFICE NEEDS

If you're a small business owner, your customers and clients may know that you're a party-of-one, but they also need to know that you are a professional who has access to what is needed for the job.

You need to be perceived as a professional, not an amateur. And nothing says amateur like someone who misses deadlines or meetings, fails to return calls or emails, or has a website with a home page that reads "under construction."

And so, without further ado, here are the 10 things that every virtual office needs, no matter where that office is.



## VIRTUAL BUSINESS PHONE NUMBER

Do you ever wish you had a separation between personal and professional, with a clear line between the two? Certain factors make it difficult to draw the line between home and work hours, and having an ability to do exactly that is essential to your mental well-being. A virtual phone number is a great solution to this problem.







Virtual phone systems, like <u>Tresta</u>, work by routing calls made to your virtual business number directly to your smartphone, allowing you to separate work calls from personal calls. You also benefit by boosting your business profile and presenting a polished, professional image. Plus, they're far superior to traditional phone lines with advanced features like:

- Unlimited business texting
- Call recording
- Analytics
- Auto attendant
- Smart routing
- And more...



#### POSTAL ADDRESS

You may do most of your work at a coffee shop, or the library, or your own kitchen table, but there is no reason for anyone else to know this.

Even though most people use the internet or cellular service to communicate and pay bills — and it really should not matter where you do your work — your customers need to know that you're legitimate. A postal address, particularly a post office box, conveys legitimacy in a way that a free email address does not.





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## ANSWERING SERVICE

This one is a little self-serving because it's what we do. But seriously, how can you run a business and personally answer every single call 24 hours a day? For your business to succeed, you need time to work.

Virtual receptionists are an outstanding solution, and <u>PATLive</u> has you covered. Virtual receptionists <u>are much</u> <u>more affordable</u> than an in-house receptionist. Our friendly and professional agents are all U.S.- based, and they'll be available 24/7 to answer calls so that you don't have to.





#### **ANSWERING SERVICE**



You can take time off from your business without worrying that clients will flock to the competition in your absence, and know that we'll take care of your clients as if they're our own.

And, they do so much more than just message taking, take advantage of an answering service for:

- Appointment scheduling
- Order processing
- Lead collection
- Event registration
- Call transfer
- And more!



#### UPDATED WEBSITE

A current website full of content and a strategy for generating web traffic is essential to any virtual business. A quick and easy method for creating your own website is <u>WordPress</u> or a similar blogging platform or content management system.

Whether you are tech savvy or not, you can find a template and some plug-ins that will suit just about any business need. Or, for a more custom look, search for a developer on <u>Upwork</u> and have your website built from scratch just for you.





### BUSINESS EMAIL ADDRESS

You need email that is accessible from any device you use. If you're looking for a free email address, Google's gmail is an obvious choice, but old standbys like AOL, Hotmail, and Yahoo! are still out there if that's what you're into.

However, we would recommend purchasing a domain (which you'll probably have when you set up your website) for a personalized email address that represents your business and conveys a higher level of professionalism. Again, you want your customers, clients and colleagues to know you're legit.





#### **CHAT TOOL**

For internal communication email is great, but it can be a little slow. Instant messaging apps that provide chat services are the solution to this, especially when you're working closely with your own team. The responses are real-time, and the notifications on both desktop and mobile are incredibly helpful.

Chat providers like <u>Slack</u> and <u>Microsoft Teams</u> help keep teams united and on the same page. They even offer video calling, making it feel like you're all in the same room.





### CLOUD-BASED STORAGE

Don't fall into the trap of having everything on your local laptop. Cloud storage securely keeps documents and files available online where they can be accessed by you from any computer or mobile device, or by any team member who has permission.

Many businesses use <u>Google Drive's cloud storage</u> for good reason. Google Docs is their version of Word, and Google Sheets is their take on Excel, and you can create, edit, and share these files online with your team members. Google isn't your thing? Check out DropBox as an alternative.





## PROJECT MANAGEMENT

No matter the size of your business, you're undoubtedly juggling multiple projects, tasks, and plans simultaneously. That's why you need project management software to help keep you organized no matter where you are in the world.

Project management software enables business owners to track progress while also facilitate collaboration among team members. <u>Basecamp</u>, <u>Trello</u>, and <u>Monday.com</u> are all great for planning projects and collaborating with others.





## CUSTOMER RELATIONSHIP MANAGEMENT

A cloud-based CRM is a platform that tracks and stores your customer information in one location. It's impossible to remember every detail about every customer and now you don't have to.

A CRM hosts contact information, past purchase history, and notes you've left for a lead or customer. Consider options like <u>SugarCRM</u>, <u>Zoho CRM</u>, or <u>Pipedrive</u> to help manage and grow your lead and customer relationships.





## INVOICING SOFTWARE

Invoicing and expense tracking software are crucial for all businesses. You need a system that will automate things as much as possible, even tracking when your invoices have been opened, and when they've been paid.

Quickbooks and Freshbooks are examples of this software. They come with a variety of payment options, including the ability to accept credit cards or bank transfers. Their reporting is also outstanding, and you'll never have to manually create a P&L ever again.







#### It's Time to GO VIRTUAL

While running your own business can be exciting, it is important to have the things you need to be professional and organized. You don't need everything on this list on your first day of work, but a work phone number, email address, website, and dependable cloudbased software are minimum requirements for any virtual office.

Having these and other tools on-hand will revolutionize your business by taking certain tasks off your hands, or by making those tasks less time-consuming. As a bonus, these things can help you look more professional, earning you credibility with leads, customers, and even potential employees, and giving you the ability to scale when you're ready to do so.



#### PROVIDE GREAT SERVICE No Matter Where You Are

All customer communication — in the form of a deliverable, a phone call, email, or a face-to-face meeting — has the potential to create loyalty and drive new business. One of the easiest ways to create a consistent and memorable customer experience is by using a professional answering service like PATLive.

By teaming up with a professional answering service, you can make full use of your precious time, project professionalism, and grow your business without handling every call yourself.



#### **MAKE EVERY CALL COUNT**

With PATLive's friendly & professional virtual receptionists.

100%

U.S. based live receptionists, all located in sunny Florida.

**2M**+

calls answered every year, on average within 4 rings or less.

**29 yrs** 

trusted experience partnering with thousands of businesses.



Start your free 14-day trial today at www.patlive.com. Email sales@patlive.com or call us for a live demo at (800) 775-7790. We're here 24/7/365.