The aim of the AAVIP Quality Virtual Business Program is to promote consistent application of Quality Control best practices that demonstrates the virtual business industry’s commitment to improving their customer experience.

Consistent high quality service comes from good systems and procedures, effective documentation and a commitment to continuous improvement by all sections of your business. This will result in higher customer satisfaction and growth through testimonials, referrals and word of mouth promotion for your business.

This checklist has been developed to assist enforce high-quality practices and service delivery within a virtual business. You can purchase the Workbook online and this provides you with more samples and information as well as the specific evidence you will be required to submit in order to become an accredited business. You can then apply to be audited once everything is in place to be eligible to receive the Quality Virtual Business Logo for display. This is the only system that approves the business rather than the individual.

The checklist below will help you work through and check off any existing evidence you may have so that you can assess what exactly you will be required to provide in order to become an accredited business.

**TO REPORT ANY BROKEN LINKS IN THIS DOCUMENT PLEASE EMAIL AUDIT@AAVIP.COM.AU**

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| --- | --- | --- | --- | --- | --- | --- |
| ID | Section Header | Item Description | In Progress | Done | Resource | Evidence Required |
| 1. | Management |  |  |  |  |  |
| 1.1 |  | Registered as a business as per Australia’s legal requirements |  |  | <https://asicconnect.asic.gov.au/> | Your Business Profile including your ABN |
| 1.2 |  | Running the business in accordance with Australia’s legal requirements within the taxation laws. (having a bookkeeping solution) |  |  | ATO Decision Tool<https://www.ato.gov.au/Business/Record-keeping/In-detail/Keeping-good-records/Minimum-record-keeping-requirements-for-small-business/> | Your results of the ATO decision Tool confirming you are an independent contractor |
| 1.3 |  | Exit Strategy and Purpose of the Business |  |  | View video by Liz Parker, CEO, 121 Temps<https://youtu.be/6qYmCFuGqsk><https://www.ato.gov.au/Business/Starting-and-running-your-small-business/Selling-or-closing-your-business/><http://www.business.gov.au/business-topics/selling-or-closing-your-business/Pages/default.aspx> | A copy of your vision board or business plan |
| 1.4 |  | Logo, ABN, business name, personal contacts name, business address and full contact details on all customer documentation including invoices, receipts, quotations, website and orders as applicable |  |  | [https://**asicconnect**.asic.gov.au](https://asicconnect.asic.gov.au)Search Google for business advice in your own state or territory. | Copy of appropriate documents showing business details. |
| 1.5 |  | Appropriate separate office space setup with an ergonomic workstation and quiet surroundings. |  |  | <http://www.webmd.com/pain-management/tc/office-ergonomics-using-ergonomics-at-the-workstation-to-prevent-injury> | Photo of your workspace |
| 1.6 |  | Owner has ultimate responsibility – Risk assessment report  |  |  | Speak to Jade Cross from Business Insurance Group – phone 07 3380 7901 or your own insurer.Download CPA Guide:<http://www.cpaaustralia.com.au/~/media/corporate/allfiles/document/professional-resources/business/risk-management-guide-for-small-to-medium-businesses.pdf?la=en>  | Copy of assessment or copy of insurance certificate |
| 1.7 |  | A Professional Development Plan that is directly linked to the services provided to your clients. |  |  | Visit resources page <http://groupspaces.com/AAVIP/wiki/Quality-Virtual-Business-Information> (Auditor - template available on website)  | Update LinkCopy of your training plan for the year including membership of organisations etc. |
| 1.8 |  | Client feedback system leading to testimonials and referrals (see continual improvements) |  |  | [www.surveymonkey.com](http://www.surveymonkey.com)Download sample surveys available to you from Qualtrics(Auditor – samples available on resources folder) | Link to your client survey or provide questions you ask. |
| 2. | Relevant ethical requirements |  |  |  |  |  |
| 2.1 |  | Integrity, objectivity, professional competence, confidentiality, professional behaviour. |  |  | Visit resources page for sample - <http://groupspaces.com/AAVIP/wiki/Quality-Virtual-Business-Information> (Auditor – check content on website) | Update link:Copy of your code of conduct – or membership organisations code of conduct |
| 2.2 |  | Process for dealing with non-adherence |  |  | Example of “Professional Standards Panel” through 121 TempsCreate a policy to handle non-compliance by your teamEg.1. Complaint received
2. Complaint presented to relevant person to address
3. Discuss future actions
4. Respond to complainant
 | Copy of your policy or process |
| 2.3 |  | Conflicts of Interest Policy |  |  | Sample Policy (see sample conflict of interest policy provided) | Copy of conflicts of interest policy or clause. |
| 2.4 |  | Confidentiality procedures and policy |  |  | Sample of Confidentiality Policy in folder | Copy of your clause or policy |
| 3. | Client relationships and engagements |  |  |  |  |  |
| 3.1 |  | System for establishing a scope of work and acceptance by the client. |  |  | See The Perfect Client Welcome Kit @ <http://virtualassistant.121temps.com/welcome-kit/> | Copy of your client agreement and/or process |
| 3.2 |  | System for gaining the client’s acceptance of the terms and conditions of the work |  |  | See The Perfect Client Welcome Kit @ <http://virtualassistant.121temps.com/welcome-kit/> | Copy of your process |
| 3.3 |  | Documenting risks and safeguards (could include a guarantee, standard disclosure statement, disclaimer , errors and omissions, handling complaints etc) |  |  | Risk Management Plan – see sample from CPA in folder | Chart of risks and how you will manage them if they occur – see template. |
| 3.4 |  | Regular review points to discuss quality of service and whether the service is still matching the needs of the client. |  |  | Customer Feedback on a regular basis and commitment to address every point raised. (schedule of review) (see sample customer survey questions) | Supply your schedule of review and how this will occur |
| 3.5 |  | Termination of engagement procedure |  |  | Should be included in client agreement . Should be included in sub-contractor agreement. | Policy or clause on terminating a client. Policy or clause on terminating a team member |
| 3.6 |  | Providing testimonials, referrals and references |  |  | Policy providing and requesting social proof.When will you supply a testimonial or referral, under what circumstances would you remove it? | Policy on when you ask and when you supply testimonials, referrals and references. Include section on when you would remove it. |
| 3.7 |  | A process for handling slow or poor payers. |  |  | Include details in your client agreement and what happens for slow payers. | Provide accounts receivable system. |
| 3.9 |  | Price/fee policies – increasing fees, appropriate fee for level of service, refunds and cancellations. |  |  | Included in agreementSee The Perfect Client Welcome Kit @ <http://virtualassistant.121temps.com/welcome-kit/>  | Supply your client agreement highlighting relevant sections |
| 3,10 |  | Technology used for remote service delivery and process for on-boarding client’s technology needs. |  |  | Sharing files, Sharing Emails, Sharing Calendars, client survey. | Provide your Technology Plan |
| 4. | Business Supply and Support  |  |  |  |  |  |
| 4.1 |  | Selecting the right people to supply service – list of their contact details |  |  | Your team profile – accountant, lawyer, web developer, coach, trainer etc. | List of your team contacts and what role they play |
| 4.2 |  | Building strong relationships for continuous service |  |  | <http://www.business.qld.gov.au/business/running/customer-service/improving-customer-service/customer-service-principles> | Provide your customer service plan |
| 4.3 |  | Information on what you do, who you help and how you help them. |  |  | Edit your Linkedin Profile and/or About Us page | Submit URL to your Linkedin profile or about us page that covers these points. |
| 4.4 |  | Process on how to handle situations when supply and support services fail |  |  | Identify areas of your business that would be vulnerable if a disaster struck and you couldn’t access anything. What would you do to fix this. What do you need to buy or put in place to help in this situation.  | Provide a disaster recovery chart or plan |
| 4.5 |  | Suitable support networks (isolation) |  |  | Join networks and support organisations (including membership of AAVIP) as peer support.List of VA Networks especially, 121 Temps, VirtuallyYours and A Clayton’s Secretary (contributors to this system)<http://www.121temps.com/><http://www.virtuallyyours.com.au/><http://vadirectory.net/> | Provide details of the organisations you are a current financial member of. |
| 5. | Continual Improvement |  |  |  |  |  |
| 5.1 |  | A process for monitoring the quality business process |  |  | Surveys, secret shopping and other ideas. | Provide your process |
| 5.2 |  | Responding to negative customer feedback and implementing improvements. |  |  | Policy on handling customer complaints. (if your network has a professional standards panel you can submit their process) | Provide your complaints handling procedure and those of your networks (if any) |
| 5.3 |  | Relevant policy and procedure manual and review process. |  |  |  | Provide an outline of where you keep your policies and procedures and when you review them. Provide a table of contents  |
| 5.4 |  | Audit process/reviewer/inspection calendar |  |  | See the workbook that accompanies this checklist | N/A |
| 5.5 |  | Training and Professional Development needs assessment for everyone connected to the business |  |  | Details of how you budget and manage you and your teams learning. | Provide your training budget and training plan for the coming year. |
| 6 | Documentation |  |  |  |  |  |
| 6.1 |  | Systemised electronic filing system |  |  | Provide an outline of how the electronic filing system works.  | Provide your file system outline and where it is stored.  |
| 6.2 |  | Offsite backup service |  |  | Must be offsite – ie. Carbonite or dropbox/one drive etc | Provide details of your off site back up solution. |
| 6.3 |  | File access and retention policy |  |  | Who can access your own files and those of your clients? How are they secured and backed up. How long do you retain client files and what happens when they no longer use your service. | Provide copy of file retention policy. Provide clause in client agreement that covers their deletion and removal. |
| 6.4 |  | Important contacts list |  |  | What will happen if you don’t show one day – how can clients contact you or your nominated contact in case of emergencies. | Provide an important contacts list and their details, advise where it is kept and who has access. |
| 6.5 |  | Emergency numbers and next of kin details |  |  | See above |  |
| 6.6 |  | Purchase Audit - Use of quality control logo to promote quality in service delivery |  |  | Where will you display the logo? Please provide links so that this can be checked. Please keep your unique accreditation number in a safe place. Monitor its use to ensure that only you are displaying your own unique logo. | Provide link to page where you will display the Quality Virtual Business Logo |