

MON	TUE	WED	THU	FRI	SAT	SUN
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			



- ✓ ORGANIZED
- ✓ EFFICIENT
- ✓ RELIABLE
- ✓ RESULTS-DRIVEN



Virtual Assistant Portfolio

PRECISION PLANNING, MEASURABLE GROWTH



SUPPORTING
YOUR BUSINESS.
ELEVATING YOUR SUCCESS.

About STRIVE

STRIVE is a professional virtual assistant and business support agency that helps business owners manage daily operations, admin tasks, client communication, research, scheduling, CRM, reports, and follow-ups. Our goal is to save client time, improve organization, and help businesses work smoothly.

HOW WE WORK



A reliable team. Clear process. Measurable results.

WHAT YOU CAN EXPECT



TIME-SAVING SUPPORT

We take care of time-consuming tasks so you can focus on growth.



ORGANIZED SYSTEMS

We keep your data, files, and workflows structured and easy to manage.



STREAMLINED COMMUNICATION

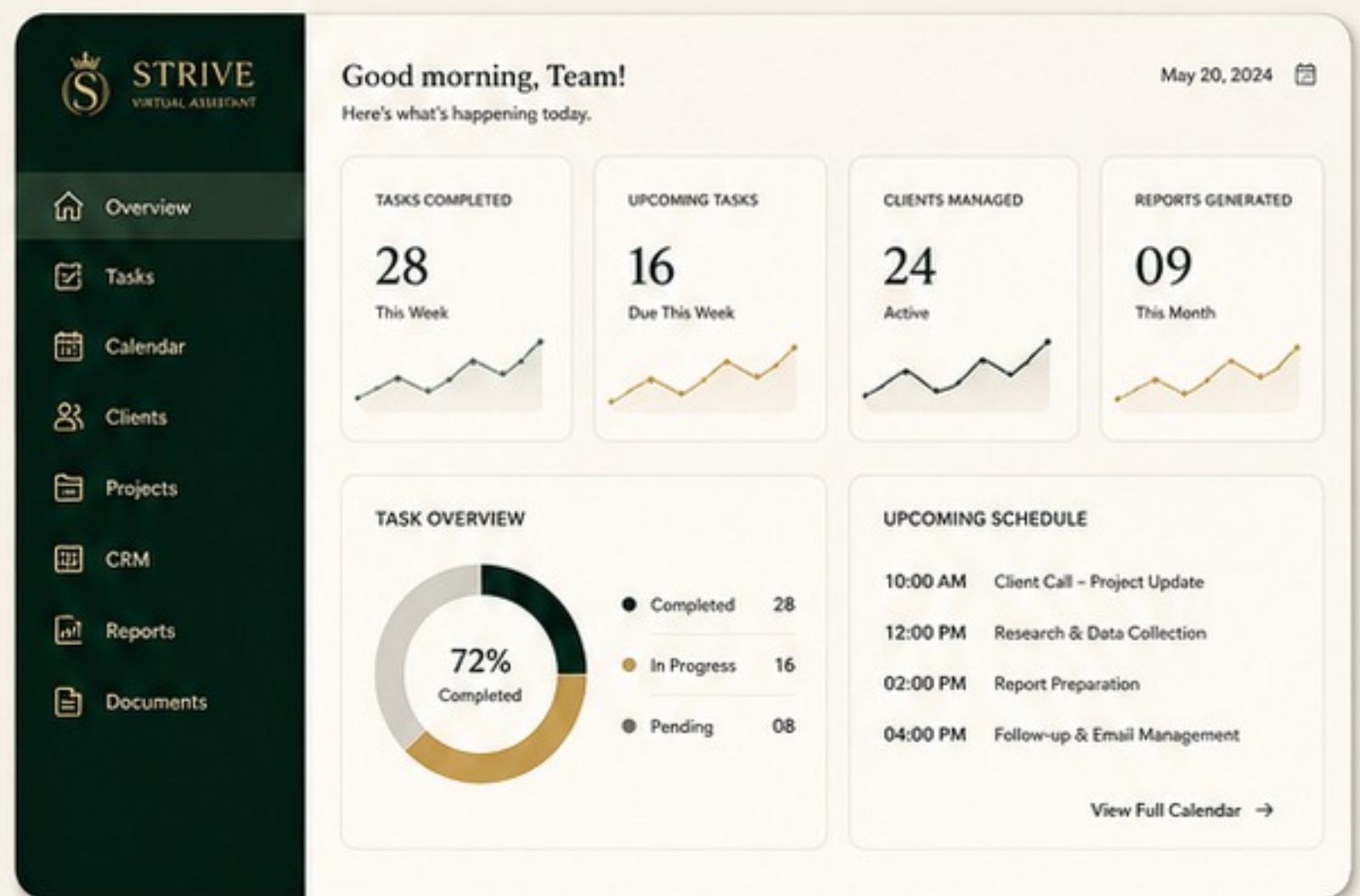
We manage emails, clients, and updates with clarity and professionalism.



OPERATIONAL EFFICIENCY

We improve processes and ensure consistency in daily operations.

SERVICE DASHBOARD PREVIEW



ORGANIZED WORKSPACE



Planned days.
Clear priorities.



Organized files.
Easy access.



Tracked tasks.
Consistent follow-through.



Focused work.
Reliable support.



Virtual Assistant *Services Overview*

Comprehensive virtual support designed to streamline your operations, save time, and help your business grow with clarity, consistency, and care.

01



Email & Inbox Management

Organizing, filtering, and responding to emails so nothing important gets missed.

02



Calendar Scheduling

Managing appointments, meetings, and reminders to keep your day running smoothly.

03



CRM Management

Updating contacts, tracking interactions, and keeping your CRM clean and efficient.

04



Data Entry

Accurate data entry, record updates, and database management you can rely on.

05



Lead Generation

Identifying and qualifying potential leads to fuel your sales pipeline and growth.

06



Web Research

In-depth research and information gathering to support smarter business decisions.

07



Customer Support

Handling customer inquiries with care, professionalism, and timely responses.

08



Documentation

Creating, formatting, and organizing documents so everything stays structured and accessible.

09



Meeting Coordination

Planning meetings, preparing agendas, and following up for smooth collaboration.

10

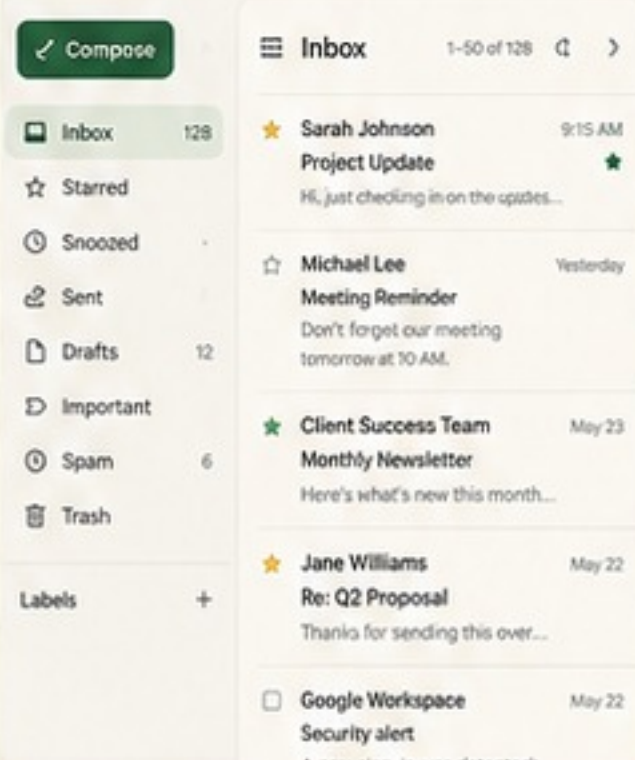


Weekly Reporting

Creating clear, insightful reports that track progress and highlight what matters most.

Work Samples

Inbox Management



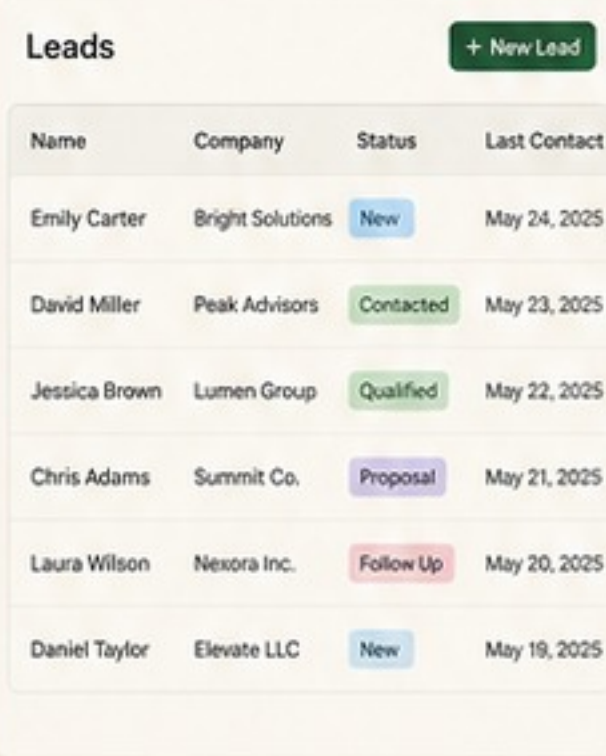
Organized inbox, prioritized messages, and timely responses to keep communication flowing.

Calendar Scheduling



Well-structured calendars that optimize time and keep your day on track.

CRM Lead Tracker



Up-to-date lead tracking, organized pipelines, and stronger sales follow-through.

Weekly Report Dashboard

Weekly Overview May 18 - May 24, 2025

Tasks Completed

86%

↑ 12% vs last week

Projects Active

12

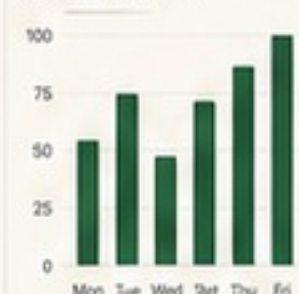
No change

Hours Saved

24.5

↑ 18% vs last week

Task Completion



Task by Category



Insightful weekly reports that highlight progress, results, and next steps.

PRECISION PLANNING • MEASURABLE GROWTH

Your Goals. Our Support. Great Results.



PROBLEMS WE SOLVE



We eliminate the daily roadblocks holding your business back.



EMAILS ARE NOT REPLIED TO ON TIME

Important messages get buried, causing delayed responses and missed opportunities.



CALENDAR IS DISORGANIZED

Overlaps, double bookings, and poor scheduling create stress and lost productivity.



FOLLOW-UPS ARE MISSED

No system in place means valuable leads and tasks fall through the cracks.



DATA REMAINS SCATTERED

Information stored in multiple places leads to confusion, errors, and inefficiency.



MANUAL REPORTING WASTES TIME

Time-consuming reports take hours that could be spent on high-value activities.



LEADS ARE NOT PROPERLY TRACKED

Without a system, leads get lost and potential revenue slips away.



CLIENT COMMUNICATION IS SLOW

Slow replies and poor updates reduce client satisfaction and trust.



BUSINESS OWNER TIME IS WASTED ON ADMIN WORK

Hours are lost on repetitive tasks instead of focusing on growth and strategy.



THE REALITY: Unorganized operations create stress, reduce efficiency, and cost you time, opportunities, and money.

You didn't start your business to be overwhelmed by admin.

BEFORE: WHAT DISORGANIZED OPERATIONS LOOK LIKE

My Tasks	
☐ Reply to client email	High
☐ Update proposal	Medium
☐ Send invoice	Medium
☐ Prepare report	High
☐ Follow up with lead	Low
☐ Schedule meeting	High
☐ Review documents	Medium
☐ Call with client	Low
☐ Send follow up email	Medium
☐ Update CRM	Low
☐ Check pending tasks	Low

MESSY TASK LIST
Unclear priorities and overwhelming to-do lists.

File Name	Owner	Status	Notes
Client_Data_v1.xlsx	Me	Old	—
Leads_March.xlsx	Me	Review	Update
Project_Notes.docx	Me	Old	Check
Report_Feb.xlsx	Me	Outdated	Fix
Data_FINAL.xlsx	Me	Duplicate	—
Clients_List.xlsx	Me	Old	—
Tasks_Backup.xlsx	Me	Review	—
Info_New.xlsx	Me	Draft	—
Final_Report(1).xlsx	Me	Duplicate	—
Document_New.docx	Me	Draft	—

UNORGANIZED SHEETS
Scattered files, duplicates, and outdated data.

Inbox	
Search mail	
Inbox 237	Unread Emails
Starred	237
Snoozed	Unread
Sent	
Drafts 12	
More	

PENDING EMAIL COUNT
High unread emails lead to delays and missed messages.

Follow Ups Tracker			
Contact	Last Contact	Next Follow Up	Status
John D.	Apr 15	Apr 18	Overdue
Sarah M.	Apr 12	Apr 15	Overdue
Mike R.	Apr 10	Apr 14	Overdue
Emily T.	Apr 09	Apr 13	Pending
David L.	Apr 08	Apr 12	Pending
Jessica W.	Apr 07	Apr 10	Pending
Chris P.	Apr 05	Apr 09	Overdue
Anna K.	Apr 03	Apr 08	Pending

MISSED FOLLOW-UPS TRACKER
Overdue follow-ups result in lost trust and lost business.



Our PROCESS

We first understand the client's business and workload, then identify repetitive tasks, create a task plan, manage daily operations, and share weekly progress reports, improving the system every week.



**BUILT ON TRUST.
DRIVEN BY RESULTS.**

- Clear communication
- Reliable and consistent
- Secure & confidential
- Results you can measure



01

DISCOVERY CALL

We learn about your business, goals, tools, and current challenges.



02

PROCESS AUDIT

We review your workflows and identify repetitive and time-consuming tasks.



03

TASK PLANNING

We build a customized task plan and organize priorities and deadlines.



04

DAILY EXECUTION

We execute tasks accurately and keep operations running smoothly.



05

WEEKLY REPORTING

We share a detailed weekly report with updates, metrics, and key results.



06

CONTINUOUS IMPROVEMENT

We analyze, refine, and improve the system every week for better results.

TASK PLANNING BOARD

BACKLOG	IN PROGRESS	REVIEW	COMPLETED
Client Onboarding	Social Media Content	Monthly Report	Data Entry
Research Competitors	Lead Follow-Up	Invoice Preparation	Email Management
Update CRM	Calendar Management		File Organization
Email Templates			

DAILY CHECKLIST

May 20, 2024

- ☒ Client Email Management 9:00 AM
- ☒ Calendar & Schedule 10:00 AM
- ☒ Project Research 11:30 AM
- ☒ Social Media Content 1:00 PM
- ☒ Lead Follow-Up 2:30 PM
- ☒ Data Entry & Updates 3:30 PM
- ☒ File Organization 4:30 PM



WEEKLY REPORT SNAPSHOT

May 13 - May 19, 2024

TASKS COMPLETED

54

+12% vs last week

HOURS SAVED

18.5

+8% vs last week

ACCURACY RATE

98%

+2% vs last week

CLIENT SATISFACTION

★★★★★ 5.0 / 5

TASKS OVERVIEW



TOP TASK CATEGORIES



OUR WORKFLOW AT A GLANCE



RELIABLE
You can count on us.



STRUCTURED
We follow a proven process.



SECURE
Your data is always protected.



RESULTS-DRIVEN
We focus on what matters.



Client Case Study 1

Executive Coaching Business

Streamlined Systems. Timely Follow-Ups. More Time for Impact.

CLIENT PROBLEM

The executive coach was overwhelmed with managing emails, scheduling sessions, client follow-ups, and admin tasks. Important opportunities were slipping through the cracks, and valuable time was being lost on repetitive work instead of client impact.

SERVICES PROVIDED

- Inbox & Calendar Management
- Client Communication & Follow-Ups
- CRM Management & Pipeline Tracking
- Session Scheduling & Reminders
- Weekly Reporting & Insights

PROCESS

1. Discovery Call – Understood goals, systems, and pain points.
2. System Setup – Organized calendar, CRM, templates, and workflows.
3. Daily Execution – Managed emails, follow-ups, scheduling, and client communications.
4. Weekly Review – Delivered reports, tracked progress, and optimized systems.

RESULT

The coach now has a reliable system that keeps everything organized, clients cared for, and opportunities moving forward—freeing up time to focus on high-value coaching.



INBOX MANAGEMENT

Primary	Social	Promotions
☐ ☆ Sarah Mitchell Re: Coaching Program Update		9:14 AM
☐ ☆ James Carter Session Follow-Up & Next Steps		8:47 AM
☐ ☆ Lisa Anderson Thank You!		Yesterday
☐ ☆ Brian Thompson Question About Next Session		Yesterday
☐ ☆ Emily Davis Re: Resources & Materials		May 14
☐ ☆ Michael Brown Coaching Agreement		May 14
☐ ☆ Jessica Lee Invoice & Payment Confirmation		May 13

CRM TRACKER

Client Pipeline Overview				
Stage	Leads	In Progress	Follow-Up	Won
Discovery Call	12	5	3	2
Proposal Sent	8	3	2	1
Onboarding	6	4	1	2
Active Client	20	–	–	–
Completed	15	–	–	–
Total	61	12	6	5

WEEKLY REPORT SUMMARY

Week of May 13 – May 19, 2024
Overview All key tasks completed. Strong client engagement and improved response times.
Highlights • 18 client emails managed • 12 follow-ups completed • 7 sessions scheduled • 3 new client inquiries • CRM updated & pipeline reviewed
Focus for Next Week • Launch new group coaching program • Follow up on 5 pending proposals • Prepare Q2 strategy plan

CLIENT FEEDBACK

“Having STRIVE as my virtual assistant has been a game-changer. Everything runs so smoothly now—my calendar, emails, and clients are all taken care of. I finally have the time and headspace to focus on what I do best: coaching and transforming lives.”

– Sarah Mitchell
Executive Coach & Business Strategist

★★★★★

OUTCOME HIGHLIGHTS



65%

FASTER EMAIL
RESPONSE TIME



98%

FOLLOW-UPS
ON TIME



40%

IMPROVEMENT IN
SCHEDULING EFFICIENCY



12+

HOURS SAVED
WEEKLY



Client Case Study 2

E-commerce Business

Streamlined support. Clean data. Consistent results.



CLIENT PROBLEM

An e-commerce brand was overwhelmed with high customer inquiries, delayed responses, messy data, and inconsistent reporting—leading to lost sales and low customer satisfaction.



SERVICES PROVIDED

- Inbox & Live Chat Support
- Customer Inquiry Handling
- Order & Refund Management
- Data Entry & Product Updates
- CRM & Lead Management
- Weekly Reports & Insights



PROCESS

- 1 Onboarded brand systems and SOPs
- 2 Organized inbox, tags, and canned responses
- 3 Resolved tickets and followed up with customers
- 4 Cleaned and updated product & customer data
- 5 Tracked leads and maintained CRM pipeline
- 6 Delivered weekly performance reports with insights



RESULT

- ✓ Faster response times
- ✓ Happier customers
- ✓ Clean and accurate data
- ✓ Improved team productivity
- ✓ Consistent weekly reporting
- ✓ Increase in repeat customers and positive reviews

SUPPORT INBOX (ORGANIZED)

Inbox	12	Search mail	
Starred			
Snoozed			
Sent			
Drafts			
More			
Labels	+		
Unassigned	3		
Orders	4		
Returns	2		
Product Questions	6		
VIP Customers	1		
Spam	0		

TICKET LOG (CUSTOMER SUPPORT)

Ticket ID	Customer	Issue Type	Status	Priority	Updated
#1001	Jessica M.	Order Status	Solved	Medium	May 22
#1002	Daniel R.	Return Request	Solved	High	May 22
#1003	Samantha L.	Product Inquiry	Solved	Low	May 22
#1004	Mark T.	Order Update	In Progress	Medium	May 21
#1005	Emily K.	Refund Status	Solved	High	May 21
#1006	Brian P.	Payment Issue	In Progress	High	May 21
#1007	Sarah J.	Shipping Delay	Solved	Medium	May 20
#1008	Kevin W.	Product Inquiry	Solved	Low	May 20

PRODUCT DATA SHEET (CLEAN & UPDATED)

SKU	Product Name	Category	Price	Stock	Status
PRD-1001	Classic Hoodie	Apparel	\$49.99	120	Active
PRD-1002	Logo T-Shirt	Apparel	\$24.99	200	Active
PRD-1003	Stainless Bottle	Accessories	\$19.99	150	Active
PRD-1004	Baseball Cap	Accessories	\$15.99	100	Active
PRD-1005	Tote Bag	Accessories	\$18.99	80	Active
PRD-1006	Crewneck Sweatshirt	Apparel	\$44.99	60	Active
PRD-1007	Zip-Up Hoodie	Apparel	\$54.99	70	Active
PRD-1008	Phone Case	Accessories	\$14.99	250	Active

Last Updated: May 22, 2025

CUSTOMER DATA SHEET (ORGANIZED)

Customer ID	Customer Name	Email	Total Orders	Status
CUST-1001	Jessica M.	jessica@gmail.com	5	VIP
CUST-1002	Daniel R.	danielr@gmail.com	3	Active
CUST-1003	Samantha L.	samantha.l@gmail.com	2	Active
CUST-1004	Mark T.	mark.t@gmail.com	4	Active
CUST-1005	Emily K.	emily.k@gmail.com	6	VIP
CUST-1006	Brian P.	brian.p@gmail.com	1	Active
CUST-1007	Sarah J.	sarah.j@gmail.com	2	Active
CUST-1008	Kevin W.	kevin.w@gmail.com	3	Active

CRM / LEAD TRACKER

New Lead	Contacted	Nurturing	Converted
12	8	6	5
Laura B. laura.b@email.com	Olivia S. olivia.s@email.com	Amanda R. amanda.r@email.com	Rachel K. rachel.k@email.com
Mike D. mike.d@email.com	Jason P. jason.p@email.com	Tom H. tom.h@email.com	David W. david.w@email.com
Kevin L. kevin.l@email.com			

WEEKLY REPORT & FEEDBACK

WEEKLY PERFORMANCE SUMMARY (May 16 – May 22, 2025)

Tickets Received	128
Tickets Resolved	124
Response Time (Avg.)	2h 18m
Customer Satisfaction	4.8 / 5
Orders Processed	96
Refunds Processed	18
New Leads Added	28

CLIENT FEEDBACK



"Great communication, fast turnaround, and very reliable. STRIVE has been a fantastic extension of our team!"

– E-commerce Business Owner



STRATEGIC SUPPORT. OPERATIONAL EXCELLENCE. BUSINESS GROWTH.

Through organized systems, proactive support, and consistent reporting, we help e-commerce brands deliver exceptional customer experiences and achieve measurable growth.





Client Case Study 3

Consulting & Service Business



STRIVE partnered with a consulting business to streamline operations, improve client communication, and ensure consistent follow-ups—allowing the owner to focus on high-value client work and business growth.



CLIENT PROBLEM

- Disorganized documents and scattered files made it hard to find important information.
- Inconsistent follow-ups led to missed opportunities and delayed responses.
- Time-consuming admin tasks pulled focus away from serving clients and growing the business.



SERVICES PROVIDED

- Documentation & File Organization
- Calendar & Meeting Management
- Lead Research & Data Management
- CRM & Follow-Up Tracking
- Client Communication & Support



PROCESS

1. Assessed workflows and identified operational gaps.
2. Set up organized systems for files, meetings, and client tracking.
3. Implemented follow-up workflows and communication templates.
4. Monitored and optimized processes for efficiency and consistency.



RESULT

- 40% improvement in response time
- 100% of client inquiries followed up within 24 hours
- Centralized systems saved 10+ hours per week
- Improved client satisfaction and stronger retention

DELIVERABLES & SYSTEMS SET UP

DOCUMENTATION & FILE ORGANIZATION

My Drive	>	Consulting Business	>	
R	Name	Owner	Last modified	
	01_Clients	me	May 10, 2025	
	02_Proposals	me	May 11, 2025	
	03_Contracts	me	May 12, 2025	
	04_Reports	me	May 13, 2025	
	05_Marketing	me	May 14, 2025	
	06_Templates	me	May 15, 2025	

MEETING SCHEDULE

May 2025				
MON	TUE	WED	THU	FRI
5 10:00 AM Client Call	6 2:00 PM Strategy Review	7 11:00 AM Project Update	7	10 1:00 PM Discovery Call
12 3:00 PM Consultation	13	14 10:30 AM Team Sync	15	16 2:30 PM Client Follow-up
19 11:00 AM Project Check-in	19	21 1:00 PM Progress Review	21	23 9:30 AM Client Call

LEAD RESEARCH SHEET (SAMPLE)

Company Name	Industry	Website	Contact Person	Notes
BrightPath Solutions	Business Consulting	brightpath.com	James Carter CEO	Interested in strategy consulting
Elevate Advisors	Operations Consulting	elevateadvisors.com	Sarah Mitchell Founder	Follow up in 1 week
Growth Catalyst Co.	Marketing Consulting	growthcatalyst.co	David Lee Director	Potential long-term partnership
Peak Performance Group	HR Consulting	peakperformance.com	Michelle Tan HR Manager	Requested proposal

CRM / FOLLOW-UP TRACKER

Lead / Client	Status	Last Contact	Next Follow-Up	Owner
BrightPath Solutions	Proposal Sent	May 10, 2025	May 17, 2025	VA
Elevate Advisors	Follow-Up	May 11, 2025	May 18, 2025	VA
Growth Catalyst Co.	In Progress	May 12, 2025	May 19, 2025	VA
Peak Performance Group	New Lead	May 14, 2025	May 21, 2025	VA

CLIENT FEEDBACK



James Carter

CEO, BrightPath Solutions

★★★★★ 5.0

The support from STRIVE has been outstanding. Everything is organized, my calendar runs smoothly, and client follow-ups are always on point. I save hours every week and can now focus on delivering real value to my clients.

“

STRIVE became an essential part of my business. The systems they set up brought clarity and efficiency, and their support helps me stay ahead every day.

— James Carter, CEO, BrightPath Solutions

”

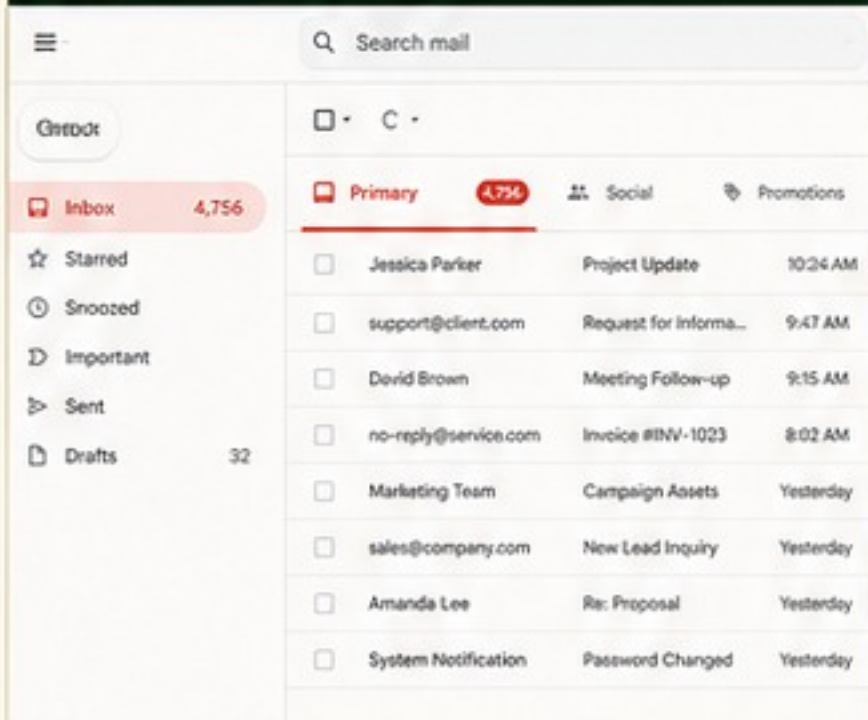




Work Samples / Screenshots

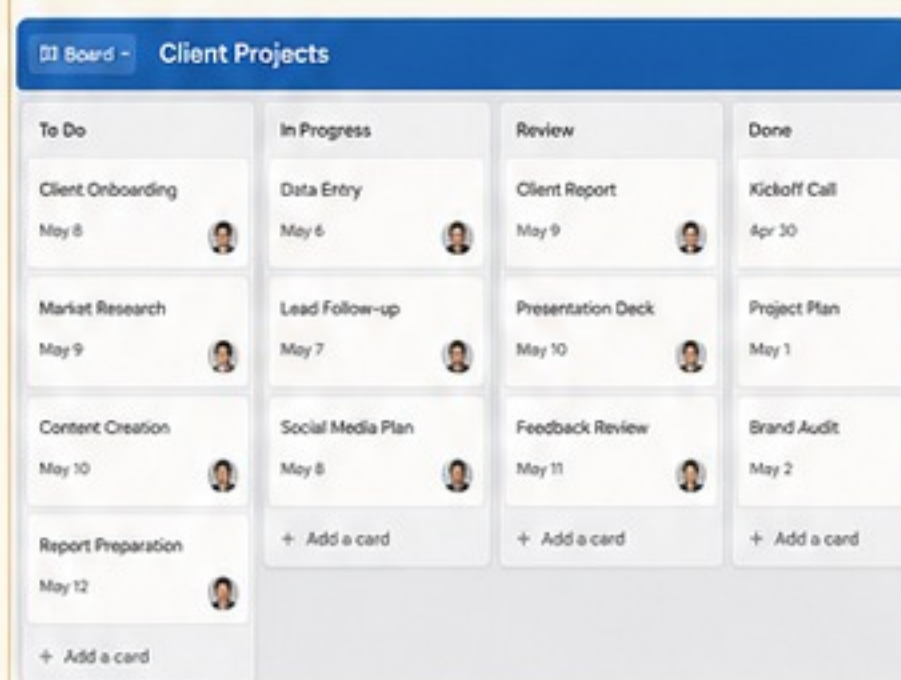
REAL EXAMPLES. REAL IMPACT.

01 Before: Overwhelmed Inbox



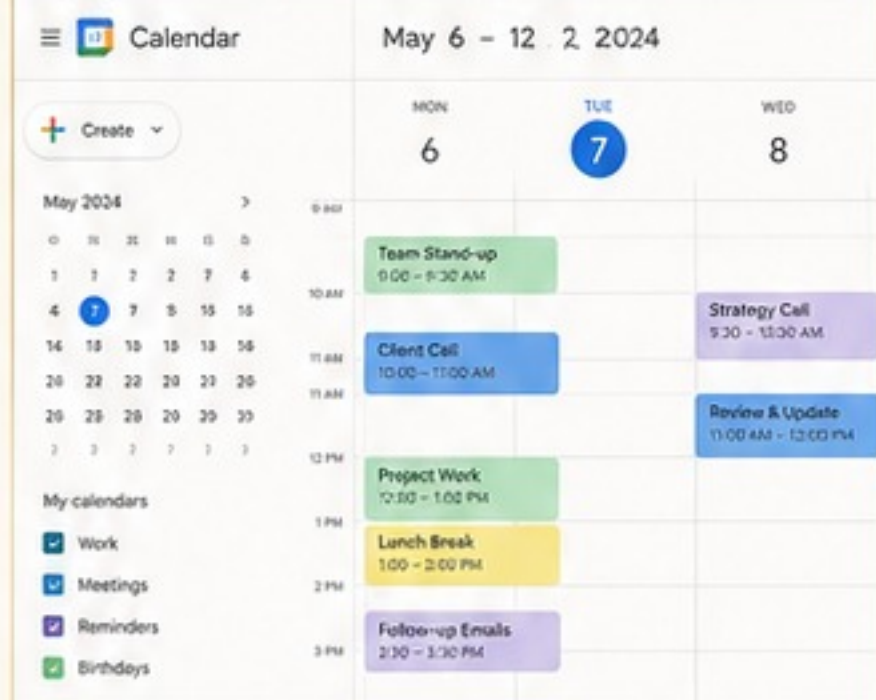
Inbox was cluttered and unorganized, causing missed messages and delays.

02 Task Board & Workflow



Structured workflow and task management for complete clarity and on-time delivery.

03 Organized Email & Calendar



Clean inbox and well-managed calendar to save time and stay ahead every day.

04 CRM / Lead Tracker

Leads					
Name	Company	Email	Status	Source	Last Contact
John Smith	ABC Corp	john@abccorp.com	New	Website	May 5, 2024
Sarah Johnson	Bright Ltd.	sarah@brightltd.com	Contacted	LinkedIn	May 5, 2024
Michael Lee	NextGen Inc.	michael@nextgen.com	Qualified	Referral	May 4, 2024
Emily Davis	Peak Solutions	emily@peakool.com	Proposal Sent	Website	May 3, 2024
Daniel Wilson	Alpha Co.	daniel@alphaco.com	Negotiation	LinkedIn	May 2, 2024
Olivia Brown	Skyline Group	olivia@skyline.com	Won	Referral	May 1, 2024
Liam Taylor	Visionary LLC	liam@visionary.com	Lost	Website	Apr 30, 2024



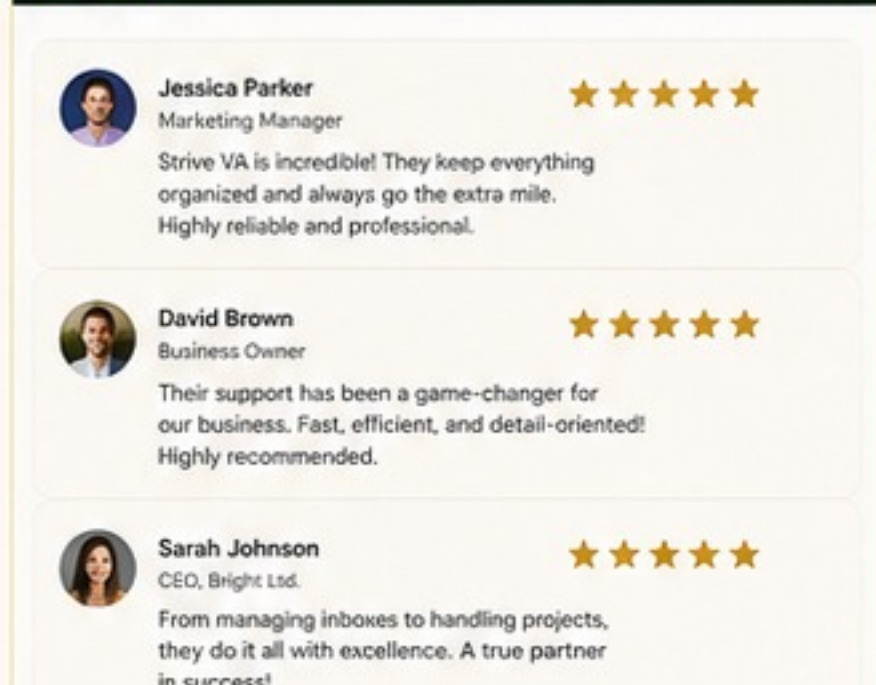
Accurate lead tracking and follow-ups that turn prospects into loyal clients.

05 Weekly Report Dashboard



Clear insights and performance tracking to support smart decisions and growth.

06 Client Feedback



Happy clients. Strong relationships. Results that speak for themselves.

TOOLS WE USE

Google
WorkspaceMicrosoft
ExcelGoogle
Sheets

Gmail

Google
Calendar

Trello



Notion



Slack



Canva

CRM
ToolsZoom /
Google MeetLead Research
Tools

RESULTS & TESTIMONIALS

Real Impact. Measurable Results. Trusted Support.

BEFORE




EMAILS DELAYED
Important emails often went unanswered or replied to late.



FOLLOW-UPS MISSING
Opportunities were lost due to inconsistent follow-ups.



DATA SCATTERED
Information was spread across multiple files and platforms.



CALENDAR MESSY
Overbooked, double-booked, and unorganized schedule.



REPORTS MANUAL
Reports were time-consuming to create and compile.



AFTER




INBOX ORGANIZED
Emails are filtered, prioritized, and replied to on time.



FOLLOW-UP SYSTEM CREATED
Timely follow-ups ensure no opportunity falls through the cracks.



CRM UPDATED
All client data is centralized, accurate, and up to date.



MEETINGS MANAGED
Calendar is optimized with efficient scheduling.



WEEKLY REPORTS SHARED
Clear, concise reports delivered consistently every week.

THE RESULTS

Delivering clarity, efficiency, and growth—every day.





20+
HOURS SAVED PER WEEK
More time for high-value work



70%
FASTER RESPONSE TIME
Clients get quicker replies



90%
REDUCTION IN MISSED FOLLOW-UPS
More opportunities converted



100%
ORGANIZED CLIENT DATA
Centralized & easy to access



35%
IMPROVED BUSINESS PRODUCTIVITY
Smoother operations & better results

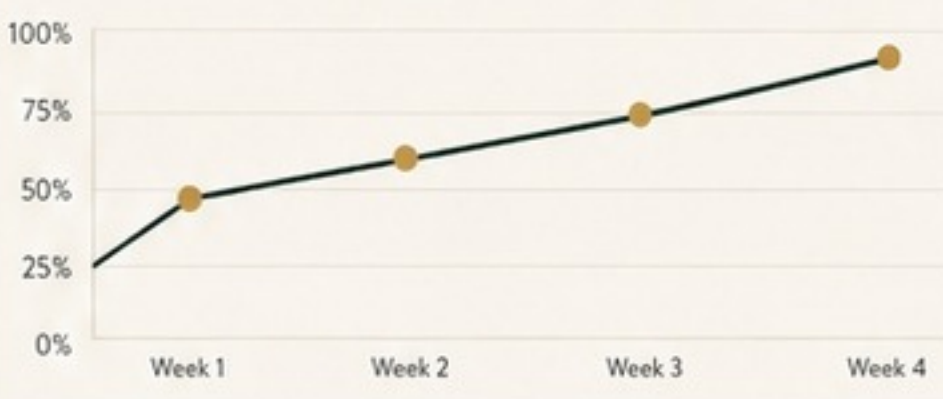
TASK COMPLETION OVERVIEW



98%
TASKS COMPLETED

- Completed 98%
- In Progress 2%
- Pending 0%

WEEKLY PRODUCTIVITY TREND



Week	Productivity (%)
Week 1	25%
Week 2	50%
Week 3	75%
Week 4	90%

CLIENT TESTIMONIALS



Online

“STRIVE helped us organize our daily tasks, manage client communication, and improve follow-up tracking. Their support saved us valuable time and made our workflow smoother.”

10:30 AM ✓



to me

May 20, 2024

★★★★★

Highly professional, detail-oriented, and reliable. Our operations are now seamless thanks to STRIVE's consistent support and proactive approach.

Reply Forward



1st

May 18, 2024

“An incredible partner! STRIVE brings structure, clarity, and efficiency to our business. Communication is excellent and results are outstanding.”

Like Comment Share

THANK YOU FOR EXPLORING MY PORTFOLIO.

I look forward to helping your business thrive with clarity, organization, and reliable support.



LET'S WORK TOGETHER TO ACHIEVE YOUR GOALS AND CREATE LASTING IMPACT.

