



STRIVE

VIRTUAL ASSISTANT PORTFOLIO

Precision Planning, Measurable Growth

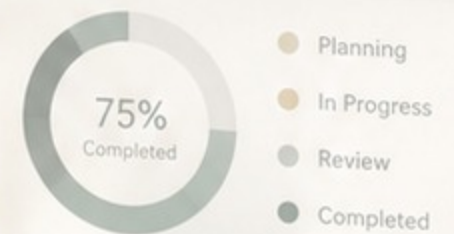
CALENDAR

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	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	1

TODAY'S TASKS

- ☒ Client Follow-Up
- ☒ Project Proposal
- ☐ Schedule Review
- ☒ Expense Report
- ☐ Team Update

PROJECT OVERVIEW





About STRIVE



STRIVE is a Virtual Assistant and Business Support Agency dedicated to helping business owners stay focused on growth. We handle the daily operations, administrative tasks, client communication, research, scheduling, CRM management, reports, and follow-ups—so you can save time, stay organized, and scale with confidence.

HOW WE WORK



01

DISCOVER

We learn about your business, goals, and daily challenges.



02

PLAN

We create a tailored support plan aligned with your priorities.



03

EXECUTE

We take action and manage tasks with accuracy and consistency.



04

MONITOR

We track progress, provide updates, and ensure everything stays on track.



05

IMPROVE

We refine, optimize, and continuously support your growth.

WHAT YOU CAN EXPECT



EFFICIENCY

Streamlined operations and fewer hours spent on repetitive tasks.



RELIABILITY

Consistent support you can count on, day in and day out.



ORGANIZATION

Well-structured systems, files, and processes for smooth workflow.



GROWTH FOCUS

More time for strategy, clients, and what truly moves your business forward.



PEACE OF MIND

Knowing the details are handled while you focus on your big picture.

SERVICE DASHBOARD PREVIEW

TASKS COMPLETED

86

+12%
This Week

HOURS SAVED

24.5

+18%
This Week

PROJECTS ACTIVE

12

+2
This Week

CLIENT SATISFACTION

98%

+5%
This Week

WEEKLY OVERVIEW



TASK CATEGORIES



SUPPORTING YOUR BUSINESS.
Elevating Your Success.





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

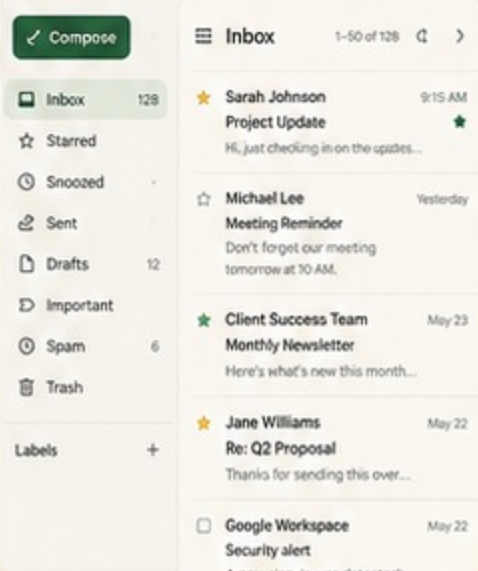


Weekly Reporting

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

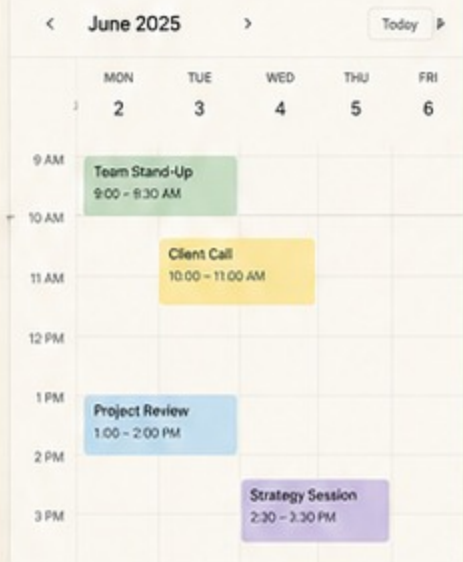
Work Samples

Inbox Management



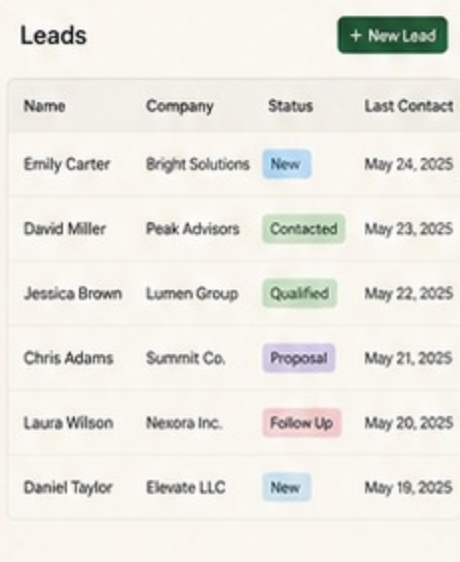
Organized inbox, prioritized messages, and timely responses to keep communication flowing.

Calendar Scheduling



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

CRM Lead Tracker



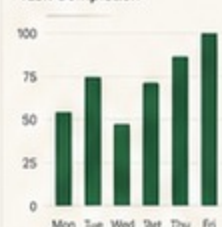
Up-to-date lead tracking, organized pipelines, and stronger sales follow-through.

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	
Starred	
Snoozed	
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

A streamlined workflow designed to save you time, reduce stress, and drive measurable results.



YOU CAN COUNT ON:



CLEAR COMMUNICATION

You're always in the loop with timely updates and transparent reporting.



RELIABILITY

Your tasks are handled with consistency, accuracy, and care.



CONFIDENTIALITY

Your information is protected with the highest standards.



MEASURABLE RESULTS

We focus on outcomes that drive growth and save you time.

TASK PLANNING BOARD

TO DO	IN PROGRESS	REVIEW	DONE
Inbox Management	Client Onboarding	Content Draft	Expense Tracking
Calendar Coordination	Research & Summaries	Report Preparation	Weekly Report
File Organization			

DAILY CHECKLIST

- ✓ Inbox & Messages
- ✓ Calendar & Scheduling
- ✓ Project Management
- ✓ Client Communication
- ✓ Research & Documentation
- ✓ Data Entry & Updates
- ✓ File Organization
- ✓ Follow-ups & Reminders

YOUR WORKSPACE



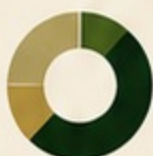
WEEKLY REPORT SNAPSHOT

TASKS COMPLETED

86%

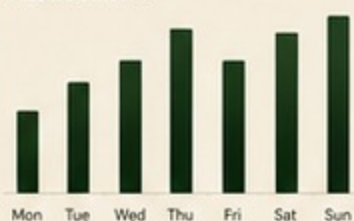
This Week

TIME ALLOCATION



- Admin
- Research
- Communication
- Other

PRODUCTIVITY



TOP PROJECTS

- Client Research
- Project Planning
- Content Review
- Report Preparation

OUR PROCESS IN ACTION





CLIENT CASE STUDY 1

EXECUTIVE COACHING BUSINESS

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



CLIENT PROBLEM

The client's emails were delayed, calendar was disorganized, and follow-ups were being missed.



SERVICES PROVIDED

- ✓ Email Management
- ✓ Calendar Scheduling
- ✓ CRM Updates
- ✓ Client Coordination
- ✓ Weekly Reporting



PROCESS

- 01 Inbox organized and prioritized for timely response.
- 02 Calendar structure built and color-coded for clarity.
- 03 Client follow-up tracker created and maintained.
- 04 Weekly reporting system implemented for visibility.



RESULT

- ✓ Reduced admin workload significantly.
- ✓ Faster email response and communication.
- ✓ Meetings properly scheduled and optimized.
- ✓ No more missed follow-ups or opportunities.

CALENDAR OVERVIEW

Calendars	May 20 – May 26, 2024				
	MON 20	TUE 21	WED 22	THU 23	FRI 24
8 AM					
9 AM	Coaching Call 9:00 – 10:00 AM		Deep Work 9:00 – 11:00 AM		
10 AM					Coaching Call 10:00 – 11:00 AM
11 AM	Discovery Call 11:00 – 12:00 PM				
12 PM					
1 PM					Discovery Call 1:00 – 2:00 PM
2 PM	Team Call 1:30 – 2:30 PM		Admin Time 1:00 – 2:00 PM		
3 PM			Follow-up Block 2:00 – 3:00 PM		
4 PM	Team Meeting 3:00 – 4:00 PM				Coaching Call 4:00 – 5:00 PM
5 PM					

Calendar Screenshot

INBOX MANAGEMENT

Inbox	Primary	Social	Promotions
★ Starred			
🕒 Snoozed			
➤ Sent			
✉ Drafts			
▼ More			
	Re: Coaching Program In...		9:20 AM
	New Client Inquiry		8:45 AM
	Follow-up from our call		Yesterday
	Session Reminder		May 22
	Payment Confirmation		May 21
	Weekly Check-in		May 20

Inbox Management Screenshot

CRM TRACKER

Client	Next Follow-Up	Status	Last Contact	Notes
Client Name	May 24, 2024	Upcoming	May 20, 2024	Discovery Call
Client Name	May 25, 2024	Completed	May 21, 2024	Follow-up
Client Name	May 27, 2024	Pending	May 22, 2024	Program Call
Client Name	May 28, 2024	Upcoming	May 23, 2024	Proposal Sent
Client Name	May 29, 2024	Completed	May 19, 2024	Check-in

CRM Tracker Screenshot



WEEKLY REPORT May 13 – May 19, 2024

OVERVIEW

A summary of tasks, client interactions, and key updates for the week.

EMAILS MANAGED

132

MEETINGS SCHEDULED

18

FOLLOW-UPS DONE

45

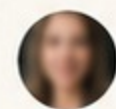
TASKS COMPLETED
36

KEY HIGHLIGHTS

- ✓ Inbox maintained with 100% response within 4 business hours.
- ✓ All appointments scheduled and client calls completed.
- ✓ Follow-ups tracked and actioned on time.
- ✓ CRM records updated and organized.

Weekly Report Screenshot

CLIENT FEEDBACK



Jessica M.
Executive Coach



“STRIVE has been an incredible support to my business. My inbox is organized, my calendar runs smoothly, and I never miss a follow-up anymore. I can now focus on my clients and growing my impact. Highly recommend!”

”

Client Feedback Screenshot

OUTCOME HIGHLIGHTS



65% ↑
FASTER EMAIL
RESPONSE TIME

From 12 hrs to 4.2 hrs avg.



90% ↑
FOLLOW-UPS
ON TIME

Missed follow-ups reduced
by 90%.



40% ↑
IMPROVEMENT IN
SCHEDULING EFFICIENCY

More focus time,
less back-and-forth.



15+
HOURS SAVED
WEEKLY

Reclaimed time for high-impact
coaching and growth.



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

- Order inquiries and customer emails were piling up.
- Product and lead data needed updating and cleaning.
- Weekly reporting was inconsistent and lacking key insights.



SERVICES PROVIDED

- ✓ Inbox management & customer support
- ✓ Data entry & record updates
- ✓ CRM updates & lead generation
- ✓ Weekly reporting & performance tracking



PROCESS

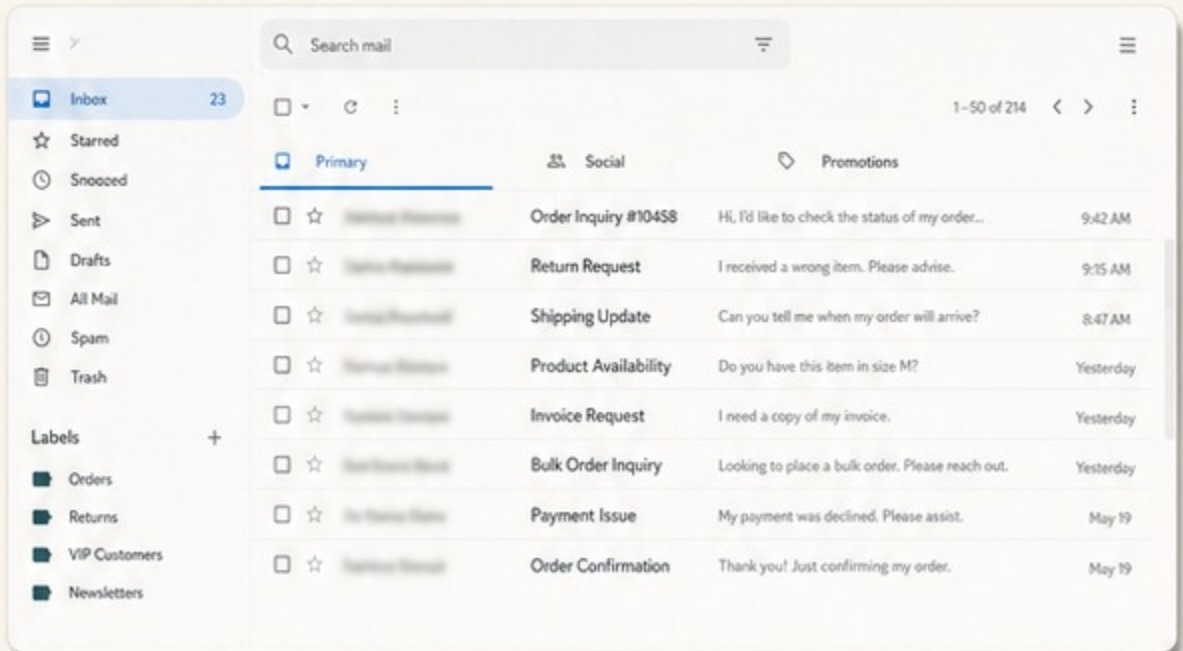
- Support inbox organized and prioritized.
- Order and client records cleaned and updated.
- Response templates created for common inquiries.
- Follow-up system implemented to ensure no inquiry was missed.
- Progress reports delivered weekly with key insights.



RESULT

- ✓ Faster customer response times.
- ✓ Cleaner and more accurate records.
- ✓ Smoother communication across channels.
- ✓ More organized operations and reliable reporting.

01 SUPPORT INBOX SCREENSHOT



02 CUSTOMER SUPPORT / TICKET LOG

Tickets					
All	Open	Pending	Solved	Closed	
126	18	27	62	21	
ID	Subject	Customer	Status	Priority	Updated
#1287	Order not received	Michelle	Open	High	May 20
#1286	Wrong item delivered	Michelle	Pending	Medium	May 20
#1285	Refund request	Michelle	Open	High	May 20
#1284	Product not working	Michelle	Solved	Medium	May 19
#1283	Change shipping address	Michelle	Solved	Low	May 19
#1282	Payment issue	Michelle	Open	High	May 19
#1281	Cancel order	Michelle	Closed	Low	May 18

03 PRODUCT / CUSTOMER DATA SHEET

ID	Product / Customer	Category	Price	Stock	Status
P1001	Wireless Headphones	Electronics	\$59.99	145	Active
P1002	Bluetooth Speaker	Electronics	\$39.99	87	Active
P1003	Laptop Stand	Accessories	\$24.99	60	Active
P1004	Desk Organizer	Accessories	\$19.99	120	Active
P1005	Smart Watch	Electronics	\$89.99	53	Active
C2001	Emily Johnson		—	—	Active
C2002	Michael Brown		—	—	Active
C2003	Sarah Davis		—	—	Active
C2004	Daniel Lee		—	—	Active

04 CRM / LEAD TRACKER

Total Leads	New Leads	Contacted	Qualified	Converted
348	57	142	76	32
Lead Name	Email	Source	Status	Last Contact
James Anderson		Website	New	May 20, 2024
Olivia Martinez		Facebook	Contacted	May 20, 2024
Liam Thompson		Instagram	Qualified	May 19, 2024
Sophia Clark		Referral	New	May 19, 2024
Noah White		Website	Contacted	May 18, 2024
Ava Harris		Ads	Qualified	May 18, 2024
William Lewis		Facebook	New	May 17, 2024
Mia Robinson		Instagram	Contacted	May 17, 2024

05 WEEKLY REPORT / FEEDBACK

Weekly Overview May 13 - May 19, 2024			
Emails Handled 214 +18% vs last week	Tickets Resolved 62 +22% vs last week	New Leads Added 48 +20% vs last week	Reports Delivered 1 On Time
Performance Summary		Client Feedback	
- Maintained 100% response rate within SLA. - Organized and updated 130+ customer records. - Generated 48 new leads and updated CRM. - Delivered weekly report with key insights.		★★★★★ "Excellent support and attention to detail. STRIVE has made a big difference in our daily operations!" — E-commerce Business Owner	

“Reliable support that keeps your business moving forward.”

CLIENT CASE STUDY 3

Consulting & Service Business

STRIVE partnered with a consulting and service-based business to streamline operations, improve client communication, and ensure consistent follow-ups—allowing the client to focus on delivering value.

“

“STRIVE brought structure, clarity, and consistency to our day-to-day operations. Everything just runs smoother now.”

— Client Owner

Consulting & Service Business



CLIENT PROBLEM

- Scattered documentation across multiple folders and devices
- Missed or double-booked meetings
- Inconsistent lead follow-ups and tracking
- Manual admin work consuming valuable time



SERVICES PROVIDED

- Documentation Support
- Meeting Coordination
- Web Research
- CRM Management
- Lead Tracking
- Weekly Reporting



PROCESS

- Document system organized and categorized
- Meeting schedule streamlined and managed
- Lead research sheet created and updated
- Follow-up tracker maintained and updated
- Weekly summary reports prepared and shared



RESULT

- Better organization and easy access to documents
- More reliable meeting coordination
- Consistent lead follow-ups and tracking
- Smoother operations and improved productivity

Name	Owner	Last modified
01_Proposals	Owner	May 15, 2024
02_Contracts	Owner	May 15, 2024
03_Client_Reports	Owner	May 15, 2024
04_Resources	Owner	May 15, 2024
05_Meeting_Notes	Owner	May 15, 2024
06_Templates	Owner	May 15, 2024

01 Documentation Folder (Organized)

SUN	MON	TUE	WED	THU	FRI	SAT
19	20	21	22	23	24	25
Strategy Call 2:00 - 3:00 PM	Client Call 10:00 - 11:00 AM	Discovery Call 1:30 - 2:30 PM	Project Update 11:00 AM - 12:00 PM	Team Sync 9:30 - 10:00 AM Review Session 2:00 - 4:00 PM		Client Call 10:30 - 11:30 AM

02 Meeting Schedule (Streamlined)

Company	Industry	Website	Contact Person	Notes
Alpha Solutions	Consulting	alphasolutions.com	John Doe	Interested in process improvement
BrightPath Co.	Business Services	brightpathco.com	Jane Smith	Potential for long-term engagement
NertGen Advisors	Consulting	nertgenadvisors.com	Mike Johnson	Follow-up in 1 week
Summit Strategies	Consulting	summitstrategies.com	Sarah Lee	Requested proposal
Elevate Group	Business Services	elevategroup.com	David Kim	Good fit for Q3 project

03 Research Sheet (Lead Research)

New Lead	Contacted	Follow-Up	Proposal Sent	Closed Won
Alpha Solutions May 10	BrightPath Co. May 12	Visionary Co. May 15	Peak Performance May 20	
BrightPath Co. May 14	Summit Strategies May 14	Elevate Group May 20	ClearView Consulting May 22	
		Quantum Group May 25		

04 CRM / Follow-Up Tracker

 Re: Feedback From: client@consultingbusiness.com To: strive.va@gmail.com
Hi Team, I just wanted to say thank you for the incredible support! You've brought so much organization and clarity to our operations. The follow-ups are consistent, meetings are well-managed, and the weekly reports are super helpful. We've definitely seen a boost in productivity. Looking forward to our continued partnership! Best regards, Client Owner

05 Client Feedback



STRIVING FOR EXCELLENCE

Every business is unique. STRIVE delivers tailored support that creates structure, saves time, and drives meaningful results.



STRIVE
VIRTUAL ASSISTANT

Results & Testimonials

REAL SUPPORT. REAL RESULTS.

BEFORE

- ✉ Emails Delayed
- ⚠ Follow-ups Missing
- 🗄 Data Scattered
- 📅 Calendar Messy
- 📄 Reports Manual

VS

AFTER

- ✓ Inbox Organized
- ✓ Follow-up System Created
- ✓ CRM Updated
- ✓ Meetings Managed
- ✓ Weekly Reports Shared

THE STRIVE IMPACT



HOURS SAVED
PER WEEK

15+

More time for
what matters



FASTER
RESPONSE TIME

65%

Clients get quicker,
clearer replies



REDUCTION IN
MISSED FOLLOW-UPS

85%

Stronger relationships,
zero slip-throughs



ORGANIZED
CLIENT DATA

100%

Accurate, updated,
easy to access



IMPROVED BUSINESS
PRODUCTIVITY

40%+

More output,
less overwhelm

TIME SAVED OVER 8 WEEKS

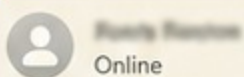


TASKS HANDLED BY CATEGORY



Admin Support	35%
Client Communication	25%
Calendar & Scheduling	15%
Data Management	15%
Reporting	10%

WHAT CLIENTS SAY



Emily Martinez
Online



You've been such a huge help!
Everything runs so smoothly
now. I can finally focus on
growing my business.
Thank you! 🙌

11:42 AM



Rebecca Martinez
To: Strive VA



Subject: Amazing Support! ★

Strive has completely transformed how
I manage my day-to-day operations.
Highly organized, proactive, and
incredibly reliable.

Best decision I've made for my business.
Thank you!



Rebecca Martinez · 2nd
Entrepreneur | Business Owner
3d · 🌐

Working with Strive has been a
game-changer. The attention to detail,
communication, and initiative are
top-notch. Highly recommend for any
busy professional or business owner!



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THANK YOU

FOR TRUSTING STRIVE
TO BE PART OF YOUR SUCCESS STORY.



STRIVE

FREELANCING AGENCY