



# SERVICE & POLICY HANDBOOK

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This guide outlines the Rafferty Solutions standard company policies, procedures and best practices in order to ensure a successful partnership.

# WELCOME!

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Thank you for partnering with Rafferty Solutions. We're excited to support your business and are committed to delivering professional, reliable, and efficient virtual assistant services tailored to your needs.

This guide outlines our essential policies, procedures, and expectations that form the foundation of our working relationship. It is designed to ensure clarity, consistency, and mutual understanding. By setting clear guidelines from the start, we aim to build a seamless and productive partnership. These standards help us maintain efficiency and ensure that your Virtual Assistant can perform at their best.

We encourage you to review this guide carefully. By engaging with Rafferty Solutions, you acknowledge and agree to the policies outlined here. Should you have any questions or need clarification, please don't hesitate to reach out to me.

**I understand that inviting someone into your business in any capacity is a big step.** We don't take that trust lightly.

My team approaches every partnership with care, respect, and a commitment to making the process as comfortable as possible. I am honored to have my agency support your business!

You are welcome to reach me anytime at [kelly@raffertysolutions.com](mailto:kelly@raffertysolutions.com) or call/text my personal cell: 215-285-7504.



**KELLY RAFFERTY**  
Owner

# MISSION AND VISION

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## **MISSION**

At Rafferty Solutions, our purpose is to serve small businesses and entrepreneurs through professional, reliable, and efficient virtual support. We exist to remove operational friction from your daily workflow—freeing you to focus on growth, vision, and impact.

As a virtual assistant agency, we offer more than just one person—we provide a team-based support model that ensures consistency, flexibility, and peace of mind. With built-in oversight, secure systems, and cross-trained professionals, our clients benefit from a structured, dependable approach that mitigates the risks of relying on a single individual.

## **VISION**

Our vision is to be the trusted partner for business owners seeking reliable, high-quality virtual support across all areas of their operations. We strive to be more than just support staff—we are a committed extension of your team, offering right-hand assistance and guidance.

Through clear communication, reliable work and exceptional service, we aim to save owners time, reduce overwhelm, and empower businesses to thrive.

# CORE VALUES

*These values guide how we show up for our clients and each other, shaping our decisions and actions both internally and externally.*

## We Deliver on What We Promise



*We show up, follow through, and meet deadlines. Our clients count on us to be dependable partners. Reliability isn't just a trait—it's the foundation of our service.*

## We Act With Integrity



*We are honest, ethical, and transparent. We take ownership of our work, follow through on commitments, and do the right thing — even when no one is watching.*

## We Protect What's Trusted to Us



*We safeguard client information with the highest level of security. Trust is vital, and we handle it with care and confidentiality.*

## We Take Initiative



*We anticipate needs and step in with suggested solutions. Our goal is to solve problems early, ease workloads and add value at every opportunity.*

## We Prioritize Clear Communication



*We communicate openly, professionally, and with respect—with clients and with each other. We set clear expectations, respond promptly, and keep everyone in the loop.*

# CORE VALUES

*These values guide how we show up for our clients and each other, shaping our decisions and actions both internally and externally.*



## We Stay Flexible and Solutions-Oriented



*We adapt to changing needs, always staying focused on solutions without compromising on quality. We adjust to changing priorities and client needs with a positive attitude.*

## We Deliver Excellence



*We uphold high standards of quality and professionalism so that our client's work is something they're proud to have represent them. Every task, message, and interaction reflects our commitment to excellence.*

## We Work as One Team



*Collaboration is key, with our colleagues and with our clients. We support each other, share knowledge, and work together to achieve great results for our clients.*

## We Own It and Learn From It



*We know mistakes can happen— we are human and not AI. We take responsibility, analyze the cause, and implement solutions to prevent them in the future, strengthening client trust.*

## We Keep Getting Better



*We're always learning and refining our processes to serve our clients better, continuously improving and evolving as a team.*

# WORKING TOGETHER

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## **Onboarding** .....

Our onboarding process starts with signing a contract, completing an intake form, sharing any necessary passwords, and scheduling your onboarding meeting. During that meeting, you'll be joined by your dedicated virtual assistant and their manager to review your priority list, begin training, and collaborate on building effective processes and a clear game plan. We'll ask plenty of questions to fully understand your business and align with your goals. If you have any existing training materials or key documents, having them ready will help things start up faster!

Workload is typically heavier at the start of the partnership as we learn your systems and processes, but as routines are established, tasks will become more efficient and time will taper off. Please be prepared for this initial ramp-up period in your budget.

## **Standard Operating Procedures** .....

We take great care in documenting SOPs (Standard Operating Procedures) for all recurring tasks, outlining the exact steps we follow. This ensures consistency, allows any team member in our agency to step in when needed, and serves as a clear agreement between you and your virtual assistant on what's being done. While we don't bill for the creation of these documents—since they're essential for our internal processes—there is a flat fee if you'd like to own copies or have for future training. You'll always be able to view and approve each SOP, but if you'd like ongoing access or export ability, please speak with Kelly about an SOP Library Purchase.

# WORKING TOGETHER



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## **Virtual Meetings** .....

All virtual meetings with our team will be scheduled through calendar invites, sent to your email address. We use Google Meet for our virtual meetings and the link to join will be in the calendar invite.

You'll find the meeting agenda conveniently listed in the description of the calendar invite, so you'll know exactly what to expect ahead of time. After the meeting, any relevant transcribed notes or recordings will also be added directly to the same invite for your reference, making it easy to revisit key points whenever needed. This system helps keep everything organized and accessible in one place.

## **Service Discussions & Feedback** .....

If any issues arise or you'd like to discuss changes/additions to your services, please communicate directly with your virtual assistant's manager or Kelly. Email is the best method of communication. Please remember that our text line is monitored by your support team and Kelly's direct phone number is listed at the front of this handbook. All communication methods are also listed on your custom dashboard.

Additionally, you may occasionally receive surveys about our service and your assistant's performance—your honest feedback is invaluable in helping us ensure we're meeting your needs and continuously improving. These are always kept confidential and are only seen by the owner.

# WORKING TOGETHER

## Support Model

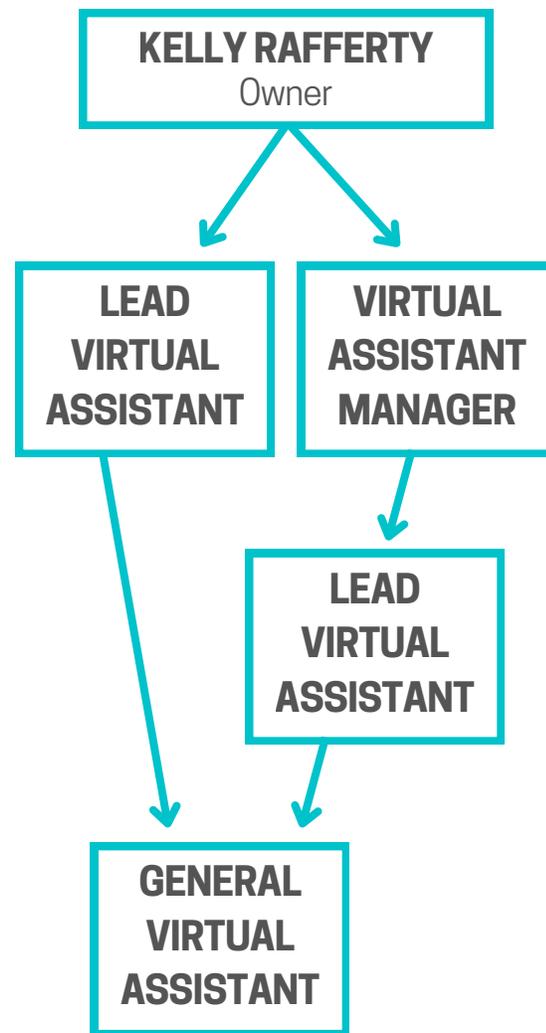
Our agency operates under a support model designed to ensure quality, consistency, and strategic alignment at every level.

At the top, our agency owner oversees all client accounts and overall operational efficiency. She develops the initial strategy, sets up processes, and ensures the best placement. In some cases, a Virtual Assistant Manager will oversee your Virtual Assistant and works to help manage execution and uphold quality standards.

Your Lead Virtual Assistant is your primary point of contact, handling day-to-day tasks and directly supporting your business, with guidance and oversight from the owner or VA Manager.

Occasionally, a General Virtual Assistant (who works under your Lead) may assist with specific projects depending on workload or project type, always under the same quality standards.

Your Lead Virtual Assistant and their direct Manager are outlined on your dashboard.



# WORKING TOGETHER



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## **Custom Dashboard** .....

Each client receives a custom dashboard, provided during onboarding, which serves as a central hub for all things Rafferty Solutions! This dashboard is a unique URL link that we encourage you to bookmark for easy access. Inside, you'll find important contact information, key links related to our work together, and direct access to our policies, holiday calendar and this handbook. It also offers a live view of your virtual assistant's current workload, keeping you updated in real time. Additionally, the dashboard highlights your tasks, should there be anything we are waiting on from you, and any upcoming projects planned for future discussions. It's designed to keep you informed and organized while cutting down on status emails!

## **Offboarding** .....

If you decide to end your partnership with us, we kindly ask for 30 days' written notice. Please note that quarterly administrative fees are non-refundable.

During the offboarding process, we'll return all documents and files stored in our project management system and ensure ownership of any shared files are fully transferred to you. We promptly remove all stored passwords from our secure vault and revoke access to any software or documents we were granted. If you've purchased an SOP Library, we will export and deliver all your SOPs for your records. Should you wish to work with us again in the future, we'd be happy to welcome you back through a new onboarding process.

# COMMUNICATION



## Communication Methods

Our primary method of communication is **email**. You will correspond with your Virtual Assistant using their dedicated Rafferty Solutions email address. To ensure transparency and consistent support, we ask that all email communications include both your Virtual Assistant and their Manager, as outlined in your customized dashboard. This policy helps maintain visibility and allows for seamless coverage in the event of an unplanned absence.

*Suggestion: Create a group in your email platform that has both email addresses and name it Rafferty Solutions.*

For time-sensitive or urgent matters, we also offer a **Rafferty Solutions texting line**. Messages sent to this number are visible to both your Virtual Assistant and their Manager, and either may respond. We do our best to indicate who is replying to keep communication clear. Please note: this is a text-only number that is not able to accept calls. It is intended solely for quick messages or verification needs that require immediate attention and should rarely be used for task assignments.

While the texting line is available for urgent communication, email remains our preferred and official method of communication. It ensures your Virtual Assistant can effectively prioritize your tasks and allows our team to keep all assignments organized and accessible in one central place.

**Rafferty Solutions Team Texting Line: 215-453-6334**

*Suggestion: Save this in your phone as “Rafferty Solutions”*

# COMMUNICATION

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## **Deadlines & Response Time** .....

Please keep in mind that your Virtual Assistant is not a full-time, dedicated employee and supports multiple clients as part of their role. While they are committed to providing high-quality support and meeting agreed-upon deadlines, they may not be immediately available for last-minute requests or real-time communication throughout the day.

We encourage thoughtful planning around project assignments, deadlines, and urgent requests to ensure expectations are met efficiently and respectfully. Your Virtual Assistant will always do their best to prioritize your needs within the scope of their availability and the structure of their work schedule.

Our standard policy is to respond to all communications within 24–36 hours. To communicate new requests that are not part of recurring work, please send an email with details or schedule a meeting to discuss.

We ask that you clearly state a deadline when giving a new task. Your Virtual Assistant will confirm acceptance of each task and will communicate any necessary deadline adjustments or confirm their ability to complete the work within the requested timeframe.

While we always aim to deliver ahead of schedule when possible, please note that expedited turnaround of a new task to be complete in less than 48 hours is not guaranteed under our standard policy.

# AVAILABILITY

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## **Working Hours** .....

Your Virtual Assistant is generally available Monday through Friday, between 9:00 AM and 5:00 PM ET. While they may choose to occasionally work outside this window, there is not a requirement or continued expectation to immediately address communication outside of this availability window.

Any work requested outside of standard operating hours (evenings, weekends, or holidays) that is deemed essential must be mutually agreed upon in advance and will be billed at 1.5 times the standard rate.

If your Virtual Assistant independently chooses to work on tasks during these off-hours, the standard rate will apply. The increased rate only applies when there is a specific request for work to be completed outside of regular hours, or when a deadline necessitates evening, weekend, or holiday support.

## **Scheduled Time Off** .....

In the event of scheduled time off—such as vacation or personal time — your VA will communicate this to you as early as possible. When notice is provided, they will also propose a plan to ensure continuity of work, whether through adjusted timelines, rescheduling, or coverage by another team member. While recurring work may occur, meetings and new projects will typically resume once your lead Virtual Assistant returns.

# AVAILABILITY

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## **Sick Time/Unplanned Absence** .....

If your Virtual Assistant needs to take an unplanned absence or sick day, a member of our team will inform you and outline how any impacted tasks will be managed. If your Virtual Assistant is able, they may also contact you to inform you of the situation. In some cases—provided nothing is time-sensitive—work may be deferred to the next business day.

As an agency, we are committed to providing reliable support and doing our best to ensure coverage during unplanned absences. While we make every effort to reassign work when needed, there may be occasions—due to existing commitments, meetings, or overall team capacity—when immediate coverage is not possible.

In such cases, work may need to pause until the following business day. While we aim for this to be the exception rather than the norm, we want to set realistic expectations that it can occasionally occur.

If another team member is available to assist during longer unplanned absences, we will always communicate this in advance for your approval, as access & verification may be required. This is why maintaining up-to-date Standard Operating Procedures is essential.

We deeply value your understanding in these situations. We recognize that health and unforeseen emergencies must take priority, and we appreciate your patience as we work quickly to resolve any gaps in coverage.

# AVAILABILITY

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## **Company Holidays** .....

Throughout the year, our company has designated Staff Holidays. On these days, your Virtual Assistant will not be available to complete tasks, respond to messages, or attend meetings. These holidays are pre-established and recognized across the agency.

While your Virtual Assistant may occasionally choose to work on a holiday, this is at their discretion and should not be expected. Any outstanding work will be resumed on the next business day following a holiday.

If you anticipate needing support that may overlap with a holiday, we kindly ask that you communicate your needs as early as possible so we can make arrangements in advance. Otherwise, please consider all Staff Holidays as non-working days. During these times, if urgent tasks arise, you may need to manage or complete the work independently until our team resumes.

### ***Rafferty Solution Company Holidays:***

**March/April:** Good Friday and Easter Monday

**May:** Memorial Day

**July:** Independence Day

**September:** Labor Day

**November:** Veterans Day, Thanksgiving & Black Friday

**December/January:** Christmas Eve through New Year's Day

# BILLING



## **Quarterly Administrative Fee**

A non-refundable quarterly administrative fee will appear as a separate line item on your invoice every three months. It will appear on your invoice at the end of each quarter and covers the upcoming quarter. This means you are billed in advance for the next three months of administrative support and account management.

This fee covers the behind-the-scenes work involved in managing your account, including:

- Estimated time your VA holds on their schedule for you
- Project and personnel oversight by Kelly or VA Manager
- Payroll, Human Resources, Training & Development of your VA
- Internal systems, software, and administrative work for efficiency

*Think of it as the operational overhead and support you'd incur with an in-house team—without the hassle of managing employees.*

We offer an optional Pre-Pay Discount Program once you know you'll be with us long-term! While the Quarterly Administrative Fee is non-refundable regardless of when it's paid, you can receive a 15% discount by pre-paying for a full year in advance.

## **Late Payments**

If payment is not received within 30 days of the invoice date, a 10% late fee will be applied to the total outstanding balance. Invoices unpaid beyond 30 days may result in a temporary suspension of services until the balance is resolved.

# BILLING



## Time Tracking

We value transparency and simplicity in our billing process. Our team tracks time using minute-by-minute software. **The chart on the next page outlines the tasks that are billable and require time tracking by our team.**

At the end of each month, total tracked time for billable events is reflected on your invoice. We round monthly total time to the nearest fifteen minute mark. There are no minimum time requirements. You're free to use our support as needed, without pressure to maintain a certain volume of work.

Invoices will include total hours worked and a summary of tasks completed.

## Paying Your Invoice

At the start of the month, you will receive an electronic invoice in your email outlining the time spent and tasks completed in the previous month.

Payment is due within 10 days of the invoice receipt.

- Make a check out to Rafferty Solutions and mail it to:  
3219 Glendale Drive, Bensalem, PA 19020
- Use Zelle to send your payment to [kelly@raffertysolutions.com](mailto:kelly@raffertysolutions.com)
- Select bill pay services from your bank
- Pay invoice through online link by ACH for 1% fee
- Pay invoice through online link by Credit/Debit for 2.9% fee

*Tip: If you mail a check, inform Kelly when it goes into the mail so we aren't reminding you about an open invoice if it happens to arrive past the due date.*

# BILLING

## Billable Time vs Non-billable Time

Is this billable?

<b>Onboarding</b> <b>Initial Meeting</b>	✓	<b>Note:</b> A manager will be on this call with your Virtual Assistant but you are only billed for your Virtual Assistant's time.
<b>All VA Virtual Meetings</b> <b>Check-Ins/New Work</b>	✓	<b>Note:</b> If a manager joins the call, you are only billed for your Virtual Assistant's time.
<b>Learning &amp; Training</b> <b>Understanding Tasks</b>	✓	<b>Note:</b> This can time be incurred by watching videos you provide, reading training material or learning from you live.
<b>Project Management</b> <b>Organizing Tools for Work</b>	✓	<b>Note:</b> It is a crucial part of efficiency to have our staff intake & organize your requests into our project system.
<b>All VA Task Work</b> <b>Recurring &amp; Assigned</b>	✓	<b>Note:</b> We track time minute by minute from the time we begin the task to the time we communicate completion to you (if necessary). This includes any short communication via email or text as well as giving a lengthy update over email, in lieu of a meeting. <i>This is generally shorter than incurring a meeting!</i>
<b>Management &amp; Development of VA</b>	✗	<b>Note:</b> Your VA will meet weekly with their manager to discuss projects and deadlines and this time is never billed.
<b>Communicating with Kelly or VA Manager</b>	✗	<b>Note:</b> When you need to discuss anything related to your account (staff feedback, changes in work, additional services, etc), that time spent by Kelly or a manager is never billed.

# CONFIDENTIALITY



## **Password Security** .....

At Rafferty Solutions, we take the security of your business and data seriously. We recognize the significant trust you're placing in us when you share access to your accounts, and we treat that responsibility with the utmost care and professionalism.

To perform our work effectively, it is usually necessary for our team to access your systems and tools. In doing so, we are committed to protecting your sensitive information at every step.

We use a highly secure and encrypted password management system for all client credentials. Passwords are submitted via a secure note directly into our secure account—never through email or unsecured channels. Once received, passwords are encrypted and only the agency owner has full access and visibility. Our team members do not see the actual passwords; access is granted securely through the system under strict controls.

This centralized and encrypted approach ensures that your credentials remain protected while allowing us to efficiently support your business.

If your accounts have two-step verification or other security checks enabled, please note that our system securely stores your passwords only. We are still subject to any additional login verification steps required by your software—just as you would be when accessing the account yourself.

# REFERRAL PROGRAM

We truly appreciate your trust in our services, and hope that you will be excited to share your positive experience with others!

**Our Referral Program is a way to thank you for spreading the word.**

When you refer a new client who signs on with us, you'll receive a 4-hour credit on your invoice after their first month of service is completed. It's our way of showing appreciation for not only your continued partnership, but for recommending us to your business colleagues. Make sure they mention you on a Discovery Call or start a three-way email with Kelly to ensure credit!

*(Limit: Four referrals per year)*



**Please Note:** This handbook may be printed for convenience; however, the most current and binding version is always the digital copy available online in the client dashboard. In the event of any discrepancies, the online version will govern, as it reflects the most up-to-date terms, policies, and procedures.



**Rafferty**  
SOLUTIONS  
Operations Consulting

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[www.raffertysolutions.com](http://www.raffertysolutions.com)