

VSG BUSINESS GUIDES
PRACTICAL GUIDES FOR REAL OPPORTUNITIES

SPECIALIZED VIRTUAL ASSISTANT & FEDERAL OPPORTUNITY MONITORING

BUSINESS STARTUP GUIDE

NICHE EXPERTISE.
MEANINGFUL OPPORTUNITIES.
A BUSINESS YOU CAN BUILD
ANYWHERE.

PREMIUM
2026
EDITION

TEMPLATES
CHECKLISTS
STRATEGIES
REAL-WORLD STEPS

*From
Opportunity
to Ongoing
Income*



NICHE
SERVICES

STAND OUT
AND EARN MORE



SAM.GOV
OPPORTUNITY
MONITORING

FIND & TRACK
OPPORTUNITIES



WEEKLY
DIGESTS

TURN INFORMATION
INTO VALUE



CLIENT
ONBOARDING

BUILD A SMOOTH
PROCESS



PRICING &
RETAINERS

CREATE STABLE
INCOME



TEMPLATES
& TOOLS

DONE-FOR-YOU
RESOURCES



90-DAY
LAUNCH PLAN

GO FROM IDEA
TO INCOME

Before You Begin

The strongest virtual-assistant businesses do not sell 'help with anything.' They sell one repeatable result to one kind of client under a written monthly scope.

BEST-USE RULE

This guide focuses on specialized, retainer-based support—especially federal contract-opportunity monitoring and other narrow recurring services. It is not a guide to becoming a low-price general administrative assistant.

What this guide helps you build

- ☐ A niche service with a clear buyer, deliverable, cadence, and boundary.
- ☐ A federal opportunity-monitoring workflow using public SAM.gov data.
- ☐ A weekly client digest that turns raw notices into a manageable shortlist.
- ☐ A retainer structure that rewards efficiency without becoming unlimited work.
- ☐ Client onboarding, search criteria, tracking, confidentiality, and escalation systems.
- ☐ A 90-day validation plan before you overbuild the service.

Guide map

1. The Business You Are Actually Building
2. Choose a Niche, Not a Task List
3. Federal Opportunity Monitoring as a Service
4. SAM.gov Search and Client Criteria
5. Build the Weekly Digest
6. Write the Scope Before the Price
7. Client Onboarding and Data Boundaries
8. Pricing, Retainers, and Capacity
9. Job Posting / Applicant Coordination as an Alternate Niche
10. Front-Office Booking as an Alternate Niche
11. Marketing and Client Acquisition
12. Operating Systems and Quality Control
13. Confidentiality, Access, and Security
14. Avoiding Procurement and Legal Overreach
15. Your First 90 Days
16. Workbook and Templates
17. Sources & Annual Verification Checklist

CHAPTER 1

The Business You Are Actually Building

You are building a recurring information-and-operations service, not selling miscellaneous hours.



A narrow service works best when the workflow is repeatable, the output is obvious, and the client knows exactly what arrives each week.

- General VA work is easy for buyers to compare on hourly price.
- Specialized work is easier to compare on outcome, speed, accuracy, and domain familiarity.
- Monthly scope gives the client predictability and gives the provider a reason to improve the system.
- The service should become more efficient over time without reducing the monthly value.

CHAPTER 2

Choose a Niche, Not a Task List

The niche is the intersection of buyer, problem, deliverable, and cadence.

FROM GENERALIST TO SPECIALIST



The narrower the promise, the easier it is to define scope, prove value, and price a monthly retainer.

Four questions

- ☐ Who has this problem repeatedly?
- ☐ What single output would make their week easier?
- ☐ How often does the output need to arrive?
- ☐ What work is explicitly outside the package?

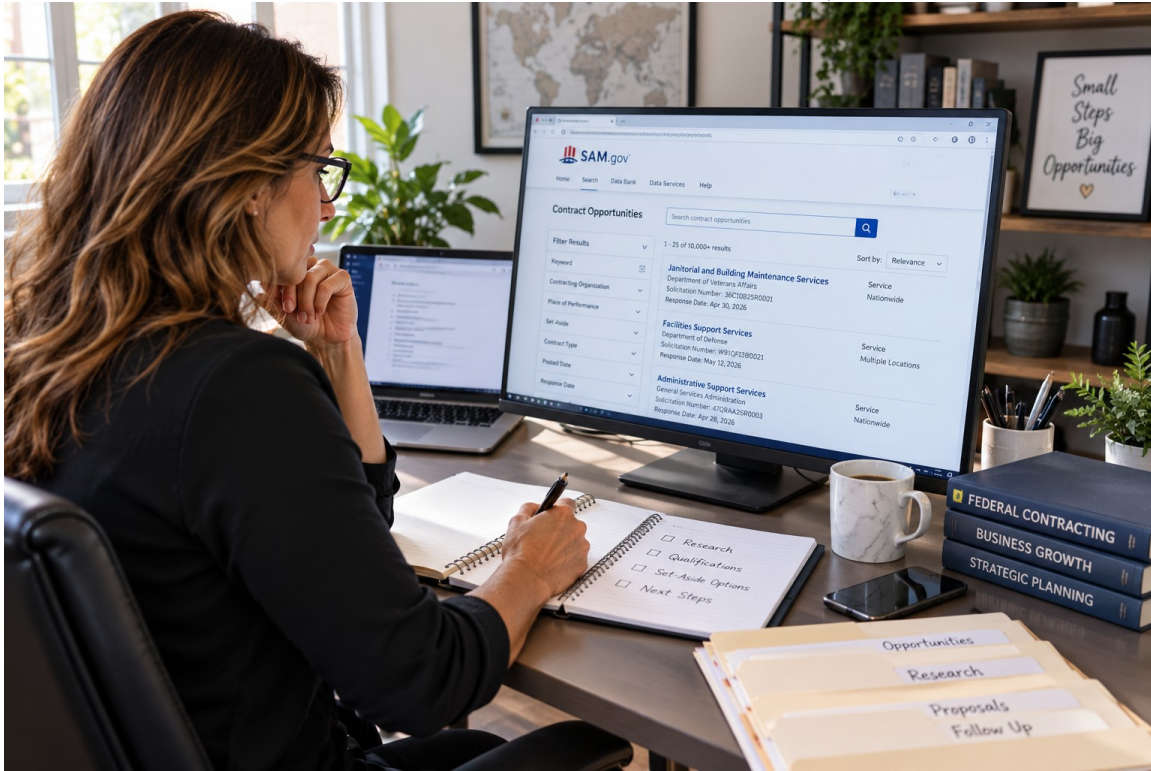
NICHE TEST

If your service description still begins with 'I can help with anything administrative,' it is not specialized enough.

CHAPTER 3

Federal Opportunity Monitoring as a Service

The service is to watch, screen, summarize, and flag—not to pretend the provider is the contracting officer, lawyer, registration agent, or proposal writer.



SAM.gov Contract Opportunities can be searched publicly; a user account adds features such as saved searches and following opportunities.

- SAM.gov describes Contract Opportunities as procurement notices from federal contracting offices.
- Anyone may search Contract Opportunities without an account.
- A SAM.gov user account can save searches, follow opportunity changes, and use additional features.
- An entity needs an active SAM registration to bid on federal contract opportunities; a monitoring service can still research public opportunities for clients.

CLIENT RESPONSIBILITY

The client remains responsible for entity registration, eligibility, certifications, representations, pricing, proposal content, and submission.

CHAPTER 4

SAM.gov Search and Client Criteria

The search becomes useful only when the client defines what 'fit' means.

Search-criteria intake

- ☐ Target NAICS and product/service categories
- ☐ Keywords and exclusions
- ☐ Agencies / sub-agencies of interest
- ☐ Place of performance

- ☐ Set-aside preferences or eligibility
- ☐ Minimum / maximum practical contract size
- ☐ Geographic limitations
- ☐ Capabilities the client will not perform
- ☐ Lead-time requirement before response deadlines

NO MAGIC FILTER

Search terms need refinement. A monitoring retainer should include a scheduled review of false positives, missed categories, and new keywords.

CHAPTER 5

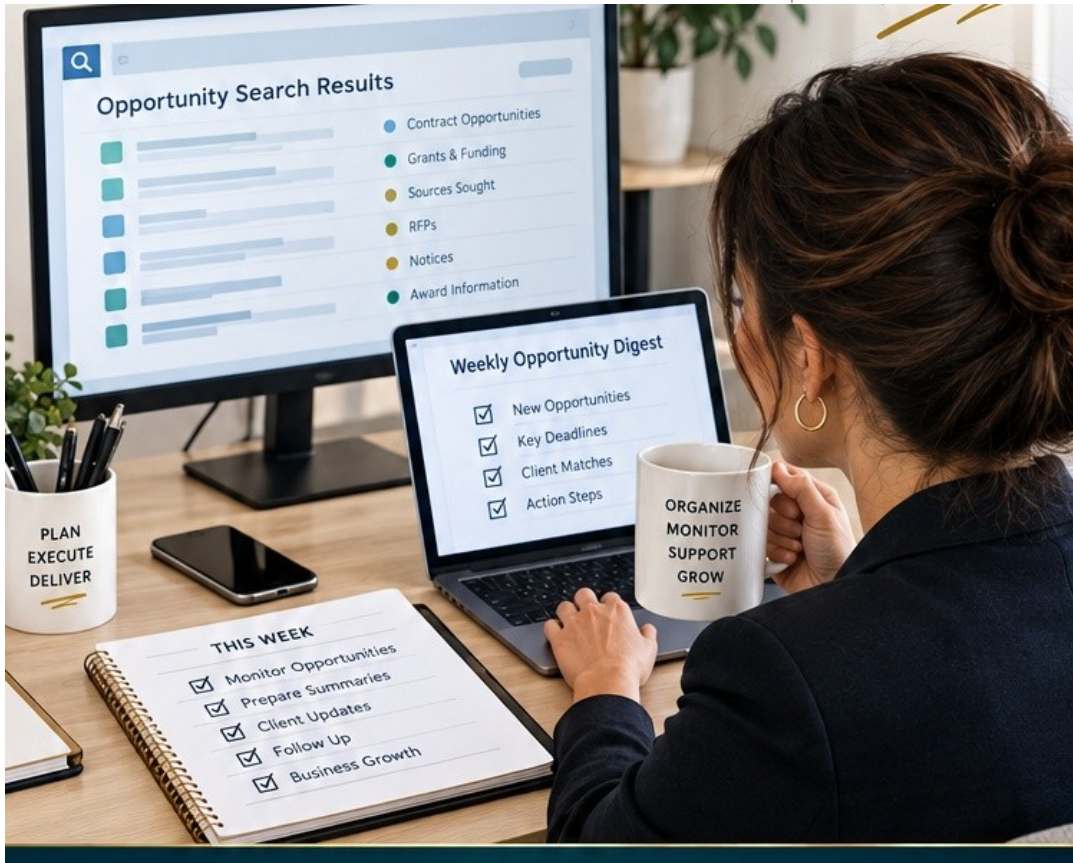
Build the Weekly Digest

The digest is the product. Raw links are not.

WEEKLY OPPORTUNITY MONITORING WORKFLOW



Monitoring is not bidding. The client decides whether to pursue an opportunity and remains responsible for eligibility, regi



A useful digest compresses many notices into a small number of opportunities the client can actually review and act on.

Recommended digest fields

- ☐ Opportunity title and notice ID
- ☐ Agency / office
- ☐ Notice type
- ☐ Posted and response dates
- ☐ NAICS / PSC if relevant
- ☐ Place of performance
- ☐ Set-aside / competition notes
- ☐ Short fit summary against client criteria
- ☐ Questions or missing information
- ☐ Recommended next action: review, monitor, or skip

DO NOT OVERSTATE

The provider can flag potential fit. Do not tell the client it is definitely eligible or guaranteed to win unless you are qualified to make and support that determination.

CHAPTER 6

Write the Scope Before the Price

A fixed fee without a boundary becomes unlimited work.

RETAINER SCOPE: INCLUDED VS. OUT OF SCOPE

INCLUDED EXAMPLE

- Defined search filters
- Weekly review cadence
- Opportunity digest
- Deadline / amendment flags
- Fit notes based on client criteria
- Monthly search refinement

SEPARATE SCOPE

- Proposal writing
- SAM entity registration
- Certifications / representations
- Legal or compliance advice
- Pricing the client's bid
- Unlimited ad-hoc admin

Scope elements

- ☐ Search platforms and data sources
- ☐ Search frequency
- ☐ Digest frequency
- ☐ Maximum number of client profiles / NAICS sets
- ☐ Included follow-up questions
- ☐ Amendment-monitoring rules
- ☐ Meeting or call allowance
- ☐ Turnaround for client-requested refinements
- ☐ Explicit exclusions

CHAPTER 7

Client Onboarding and Data Boundaries

You need enough information to monitor effectively, but not unlimited access to the client's business.

- ☐ Collect a capability statement or concise description of services/products.
- ☐ Collect target customers, NAICS, geographic limits, and past-performance themes.
- ☐ Ask for public identifiers only when needed for search and qualification context.

- ☐ Avoid asking clients to share passwords when public-search or provider-owned accounts will do.
- ☐ Use a written rule for storing documents, deleting old files, and handling confidential client information.
- ☐ Do not put client confidential information into public AI or SaaS tools without permission and an appropriate data-use policy.

CHAPTER 8

Pricing, Retainers, and Capacity

The price should reflect the defined result, not the time it takes after you become efficient.

ILLUSTRATIVE RETAINER ECONOMICS

Example only - replace all numbers with your own scope, time, price, taxes, and overhead.



The point is not a target rate. It is to price the outcome and cap the scope so efficiency does not reduce revenue.

Capacity model

- ☐ Estimate weekly research time per client.
- ☐ Estimate digest preparation and quality-check time.
- ☐ Add client-call / email allowance.
- ☐ Add admin, software, insurance, taxes, and nonbillable sales time.
- ☐ Set a maximum number of active clients before quality drops.

ILLUSTRATIVE ONLY

The chart is a teaching example, not a recommended rate card. Validate your own price against scope, time, buyer value, and market response.

CHAPTER 9

Job Posting / Applicant Coordination as an Alternate Niche

A second viable specialized offer is recruiting-administration support for small employers that do not need a full HR department.

- ☐ Post approved job descriptions to approved platforms.
- ☐ Maintain applicant-status trackers.
- ☐ Schedule interviews.
- ☐ Send client-approved communications.
- ☐ Keep hiring decisions with the employer.
- ☐ Avoid making employment-law, classification, compensation, discrimination, or eligibility decisions unless qualified and contracted to do so.

CHAPTER 10

Front-Office Booking as an Alternate Niche

Appointment coordination can be valuable when the buyer loses work because messages, scheduling, reminders, and follow-ups are inconsistent.

- ☐ Define channels you monitor.
- ☐ Define business hours and response standards.
- ☐ Define appointment rules and services you may schedule.
- ☐ Define escalation for complaints, medical/legal questions, refunds, and emergencies.
- ☐ Use client-approved scripts.

DO NOT MIX NICHEs BY DEFAULT

A federal-opportunity monitoring retainer and a booking-desk retainer are different products. Keep their scope, systems, and marketing separate.

CHAPTER 11

Marketing and Client Acquisition

Lead with the recurring pain, not the title 'virtual assistant.'

- Small businesses pursuing federal work but not consistently monitoring opportunities
- Small employers drowning in applicant logistics
- Solo service providers losing bookings to slow response
- Existing document/proposal clients who need monitoring before writing

Simple outreach

- ☐ Ask what recurring administrative task gets postponed every week.
- ☐ Show one sample weekly deliverable.
- ☐ Offer a paid pilot with a defined end date.
- ☐ Convert only after the buyer uses the output.

CHAPTER 12

Operating Systems and Quality Control

Recurring services are won or lost on consistency.

- ☐ Maintain a client criteria sheet.
- ☐ Keep a search-change log.
- ☐ Use a standard digest template.
- ☐ Record every opportunity screened and disposition.
- ☐ Run a weekly quality check for missed deadlines, duplicate notices, and stale searches.
- ☐ Review client criteria monthly or quarterly.

CHAPTER 13

Confidentiality, Access, and Security

A remote service can handle sensitive business information even without touching money.

- ☐ Use MFA on business email, password manager, and client-facing systems.
- ☐ Use separate client folders and least-privilege access.
- ☐ Do not reuse client passwords or store them in plain text.
- ☐ Keep a written breach / lost-device response process.
- ☐ Avoid downloading controlled or sensitive solicitation attachments unless the client has the right access and you understand the handling requirements.

CHAPTER 14

Avoiding Procurement and Legal Overreach

Monitoring is administrative research. It is not a guarantee of eligibility, compliance, award, or legal sufficiency.

- ☐ Do not represent yourself as affiliated with SAM.gov, GSA, SBA, or any agency unless you actually are.

- ☐ Do not promise awards or 'guaranteed contracts.'
- ☐ Do not submit client certifications, representations, bids, or legally binding responses unless explicitly authorized and appropriately qualified.
- ☐ Do not charge for 'government registration access' as though SAM.gov itself charges a registration fee.
- ☐ Refer clients to official resources or qualified professionals when the issue moves beyond your scope.

CHAPTER 15

Your First 90 Days

Validate the niche before turning it into a large service menu.

Days 1-30: Validate the pain

- ☐ Choose one buyer type and one recurring task.
- ☐ Interview 10-20 potential buyers.
- ☐ Create one sample deliverable.
- ☐ Write the scope before setting the price.

Days 31-60: Run paid pilots

- ☐ Sign one to three pilot clients.
- ☐ Track actual research, communication, and delivery time.
- ☐ Refine exclusions and escalation rules.
- ☐ Collect feedback on what the client actually uses.

Days 61-90: Convert or close

- ☐ Offer recurring retainers only to active users.
- ☐ Set capacity limits.
- ☐ Add one process improvement that reduces time without reducing value.
- ☐ If the niche does not convert, stop rather than letting it become random hourly VA work.

CHAPTER 16

Workbook and Templates

Use these pages while building the service. The open space is intentional.

Client niche & criteria sheet

Client: _____

Buyer type: _____

Primary recurring problem: _____

Monthly deliverable: _____

Search / task cadence: _____

Keywords: _____

NAICS / service categories: _____

Agencies / markets: _____

Geography: _____

Set-aside / eligibility notes: _____

Exclusions: _____

Escalation contact: _____

Out-of-scope work: _____

Weekly opportunity digest template

FIELD	ENTRY
Opportunity / Notice ID	_____
Agency	_____
Response date	_____
NAICS / PSC	_____
Place of performance	_____
Set-aside / competition	_____
Why it may fit	_____
Questions / risks	_____
Client action	Review ☐ Monitor ☐ Skip ☐

CHAPTER 16

Workbook - Retainer Scope Builder

Service name: _____

Monthly price: _____

Search / service frequency: _____

Deliverable frequency: _____

Included client profiles: _____

Included meetings: _____

Included revisions: _____

Response standard: _____

Client responsibilities: _____

Provider responsibilities: _____

Out-of-scope services: _____

Overage / separate-project rule: _____

Cancellation / renewal: _____

CHAPTER 17

Sources & Annual Verification Checklist

Recheck platform features and federal systems before relying on them in a live client service.

Primary sources reviewed for this edition

- Internal source: VSG_Virtual_Assistant_Business_Model_2026.docx.
- SAM.gov - Contract Opportunities.
- SAM.gov - Find Contract Opportunities.
- SAM.gov - Contracting / Contract Awards transition information.
- SAM.gov - Help for searching, following, and saving Contract Opportunities.
- U.S. Small Business Administration - Federal contracting assistance and small-business resources.

Annual / workflow verification checklist

- ☐ SAM.gov opportunity-search features and saved-search behavior
- ☐ Client active registration status before the client bids
- ☐ Current NAICS / PSC criteria used by the client
- ☐ Agency forecasts and other official discovery sources
- ☐ Client representations, certifications, and set-aside eligibility
- ☐ Data-security and password-handling procedures
- ☐ Scope exclusions and overage rules
- ☐ Actual hours per client and capacity limit
- ☐ Current software, insurance, tax, and administrative costs

FINAL QUALITY RULE

A specialized VA retainer should make the client's decision-making easier without quietly becoming proposal writing, compliance consulting, unlimited admin, or a substitute for official federal resources.