

Documents, Spreadsheets and Templates Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

Business documents often start life as rough notes, copied-and-pasted files, old templates or “nearly finished” drafts. Jessanol can help create, update and tidy documents, spreadsheets and templates so they are clearer, more consistent and easier to use.

This is about turning scattered information into something practical, presentable and fit for purpose.

THIS IS USEFUL IF

This type of support may be useful if:

-  You keep reusing old documents and hoping nothing important has been missed
-  Your templates are inconsistent or out of date
-  You have notes that need turning into a proper document
-  You need a spreadsheet created, updated or tidied
-  You have Canva designs that need updating with new content
-  You need client-facing documents to look more polished
-  You are wasting time recreating the same thing from scratch

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help create, update and tidy business documents, spreadsheets and templates across Microsoft, Google and Canva.

This may include:

- Creating documents from notes or rough content
- Updating existing documents
- Formatting Word documents, Google Docs or PDFs
- Creating or improving spreadsheets
- Updating Canva templates or branded assets
- Tidying presentations, forms, checklists or client-facing documents
- Creating reusable templates for repeated tasks
- Checking documents for issues

RECOMMENDED RHYTHM

This can be done as needed, or as part of regular admin support.

For example:

- A one-off document tidy-up or as a regular update
- Project-based document creation
- Support before launches, events, proposals or client onboarding.

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Access to Microsoft 365, Google Workspace, Canva etc.
- Any brand guidelines or visual style preferences
- Existing examples or previous versions
- Preferred formats, such as Word, PDF, Google Docs, Excel, Google Sheets or Canva
- Clear guidance on who reviews or approves the final version.

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- Which version of a document is the current version
- Whether the document is internal, client-facing or public-facing
- What format the final version needs to be in
- Whether Jessanol should create a new version or update the existing file
- What must be checked by you before use

Original files should not be overwritten unless agreed.

Any figures, dates, prices, legal wording or specialist content should be checked by you before the document is used or shared.

STEP-BY-STEP INSTRUCTIONS

1. Confirm the purpose of the document, spreadsheet or template.
2. Locate the current version or source materials.
3. Check whether there are existing examples or brand guidelines to follow.
4. Create or update the file using the agreed platform.
5. Apply clear formatting, headings and naming conventions.
6. Check for obvious errors, missing information or formatting issues.
7. Save the updated version in the agreed folder.
8. Share with you for review.
9. Make agreed amendments and save the final version.

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- The file or source content to be worked on
- Any previous examples you like
- Any brand guidance, logos, colours or templates
- A short explanation of who the document is for
- The preferred final format
- Any deadline or review process
- Any content that must not be changed

Rough notes are fine. Half-finished documents are fine. "I made this ages ago and it needs sorting" is also fine.

WHAT YOU'LL GET BACK

You should have:

- Clearer documents
- More consistent templates
- Better organised spreadsheets
- Files that are easier to use, update and share
- Less time spent formatting, fixing and recreating things
- A more professional feel across everyday business documents

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me:
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