

Virtual Staffing Blueprint

Three agency paths, three staffing shapes. Agency owners are heading into a defined operating model choice, with a decision window through June 2027 and a 2028 start. This guide shows what the team behind each path actually looks like: who you hire, in what order, for how many hours, what each person owns, how the first 90 days run, and the reporting rhythm that keeps it honest.

How to use this

- Take the Path Fit Assessment first so you know which section to read closely.
- Read your path end to end, then skim the one above it so you can see what changes.
- Pick one role and hire it. A staffing plan you never start is a document, not a plan.

The three paths at a glance

Path	Shape	Team	Monthly range
Protection Agent	Focused book, lean footprint	2 to 3 part time virtual roles	\$1,800 to \$3,200
Managing Agent	One strong location, real team	4 to 5 roles, mostly full time	\$5,200 to \$9,500
Market Managing Agent	Multi location or downline	6 to 8 roles plus a manager	\$11,000 to \$22,000

The industry model behind these three paths is still being finalized. Treat this as a planning tool for the decision window through June 2027, not as carrier guidance. Nothing here is specific to any one carrier.

PROTECTION AGENT

Protection Agent

A focused book, run lean, with support instead of payroll.

Org chart

Owner / producer
Service VA (part time, 20 hrs)
Telemarketer (part time, 20 hrs)
Social media manager (optional, 10 hrs)

Role by role

Role	Hours	What the role owns	Order
Service VA	Part time, 20 hrs	Endorsements, certificates, billing questions, inbound service queue, daily service log.	Hire first
Telemarketer	Part time, 20 hrs	Outbound lists, quote appointments, cross sell campaigns, daily dial and set report.	Hire second
Social media manager	10 hrs	Content calendar, review requests, community posts, monthly reach report.	Optional, month six

First 90 days

Window	What good looks like
Days 1 to 15	Access, tools, shadowing. Role reads the SOP and rewrites it in their own words so you know it landed.
Days 16 to 45	Live work under review. You spot check every day, then every other day.
Days 46 to 75	Own the queue. Daily end of day report without being asked.
Days 76 to 90	Numbers on a scorecard. First quarterly goal set together.

Reporting rhythm to expect

- Daily: end of day report, five lines, same format.
- Weekly: 20 minute one on one, three numbers reviewed.
- Monthly: what got stuck, what to document next.

Rough monthly operating picture

\$1,800 to \$3,200 per month for two part time virtual roles at offshore staffing rates, including CRM and dialer tooling, excluding lead spend.

MANAGING AGENT

Managing Agent

One strong location, a real team, and process that holds without you.

Org chart

Owner
Executive assistant (full time)
Service VA (full time) Second service VA when volume passes one desk
Telemarketer (full time)
Social media manager (part time, 20 hrs)
Producers (4 to 8)

Role by role

Role	Hours	What the role owns	Order
Service VA	Full time	Whole service queue, policy changes, carrier follow up, daily service scorecard.	Hire first
Telemarketer	Full time	Outbound campaigns, appointment setting for every producer, daily dial, contact, and set numbers.	Hire second
Executive assistant	Full time	Your calendar, reporting rollups, accountability rhythm, onboarding, vendor follow up.	Hire third
Social media manager	Part time, 20 hrs	Content, reviews, local presence, lead source attribution reporting.	Hire fourth
Second service VA	Full time	Overflow service, renewal review, retention outreach.	When service passes one desk

First 90 days

Window	What good looks like
Days 1 to 15	Systems access, SOP walkthrough, shadow the person who does the work today.
Days 16 to 45	Take half the volume. Daily review with the executive assistant, not with you.
Days 46 to 75	Full volume. Scorecard numbers start being published to the team.
Days 76 to 90	Role owns its outcome. You review the number, not the task.

Reporting rhythm to expect

- Daily: each role posts its numbers in one shared place before end of day.
- Weekly: 45 minute team accountability meeting that never gets cancelled.
- Monthly: scorecard review, one process improvement shipped.
- Quarterly: role by role scope check. Anything drifting gets rewritten.

Rough monthly operating picture

\$5,200 to \$9,500 per month for three to four full time virtual roles plus one part time, at offshore staffing rates, including tooling and excluding lease, lead spend, and producer compensation.

MARKET MANAGING AGENT

Market Managing Agent

A company: multiple locations or a downline, with a management layer under you.

Org chart

Owner
Executive assistant (full time)
Operations lead (full time)
Service VA pod (2+ full time)
Telemarketing pod (2+ full time)
Social media manager (full time)
Recruiting coordinator (part to full time)
Location leads / producers (9+)

Role by role

Role	Hours	What the role owns	Order
Executive assistant	Full time	Calendar, reporting cadence across locations, weekly packet, follow up on every commitment.	Hire first
Operations lead	Full time	The virtual team, hiring and ramp, SOP upkeep, escalations that would otherwise reach you.	Hire second
Service VA pod	Full time each	Service by location or by line, shared queue, one published service standard.	Two to start
Telemarketing pod	Full time each	Appointment setting across producers, campaign testing, weekly source performance.	Two to start
Social media manager	Full time	Brand across markets, recruiting content, reviews, paid coordination.	With the pods
Recruiting coordinator	Part to full time	Candidate pipeline, screening, licensing follow up, first 30 days of onboarding.	At a producer per quarter

First 90 days

Window	What good looks like
Days 1 to 15	Operations lead owns onboarding. You meet the hire twice and then step back.
Days 16 to 45	Pod assignment, paired work, standard published for the role.
Days 46 to 75	Independent volume. Weekly numbers roll into the location packet.
Days 76 to 90	Role is in the standard scorecard. Ramp reviewed for the next hire.

Reporting rhythm to expect

- Daily: pod stand up, ten minutes, numbers only.
- Weekly: operations lead delivers one packet covering every location.
- Monthly: owner reviews the packet trend, not the daily detail.
- Quarterly: hiring plan and cash model refreshed against actuals.

Rough monthly operating picture

\$11,000 to \$22,000 per month for six to eight virtual roles including a management layer, at offshore staffing rates for support roles, including tooling and excluding leases, producer compensation, and marketing spend.

THE HONEST PART

What breaks if you skip this

Every failure below is common, cheap to prevent, and expensive to fix after the fact.

Skip this	What it costs you
No written SOP	Every hire takes three months to be useful and leaves knowing nothing you can reuse.
No scorecard per role	You manage by feel, and the first quiet month becomes a surprise.
Hiring out of order	You add outbound before you can service the business you already sold.
No accountability meeting	The rhythm dies in six weeks and you go back to being the bottleneck.
No cost model	Payroll grows faster than revenue and margin disappears without a single bad decision.
Waiting until 2027 to start	You will be choosing a path on paper instead of choosing the one you have already proven.

Next step

- Take the Path Fit Assessment at academy.integration-ops.com/offerings/path-fit
- Download the Role SOP Pack and hand the right SOP to your first hire.
- Use the 2027 Decision Timeline planner to put dates on the decision.

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