

CHECKLIST

VIRTUAL ASSISTANT ONBOARDING



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The first week with a new virtual assistant determines whether your partnership will thrive or struggle. This checklist ensures you provide the foundation, tools, and communication structure your VA needs to become productive immediately while building the trust and clarity that transforms good hires into exceptional long-term team members.

Checklist

1. Pre-Day One: Access & Tools Setup

- ☐ **Grant access to all necessary tools and platforms**
Provide login credentials for project management software, communication tools, email accounts, and any specialized platforms your VA will use. Having everything ready prevents first-day delays and demonstrates your organizational professionalism.
- ☐ **Set up project management system with initial tasks**
Create a board in Trello, Asana, or your chosen tool with your VA's first assignments clearly outlined. This gives them an immediate starting point and shows how work will flow through your system.

- ❑ **Prepare welcome document with business overview**

Create a brief introduction to your company, mission, key clients, and business values. This context helps your VA understand the bigger picture beyond individual tasks and feel connected to meaningful work.

2. Day One: Foundation Building

- ❑ **Conduct welcome video call or send personalized video message**

Schedule a live call if time zones permit, or record a Loom video introducing yourself, your business, and expressing enthusiasm about the partnership. Personal connection from day one builds relationship foundations that transcend transactional work.

- ❑ **Review the three initial tasks in detail**

Walk through each of the starter tasks you've assigned, explaining not just what to do but why it matters to your business. Share examples of excellent work so your VA knows exactly what success looks like.

- ❑ **Establish communication protocols and response expectations**

Clarify which platform to use for different types of communication (Slack for quick questions, email for formal updates, etc.), your typical response times, and when urgent issues should escalate to phone/text. Clear expectations prevent anxiety and misunderstandings.

- ❑ **Share your schedule and availability windows**

Let your VA know when you're typically available, when you're offline, and the best times to reach you. This

respect for boundaries works both ways and helps asynchronous communication flow smoothly.

3. Days Two-Three: Process Mastery

- ❑ **Provide access to all SOPs and process documentation**

Share your standard operating procedures, templates, and any recorded training videos. Even if procedures seem simple to you, written documentation prevents confusion and gives your VA reference materials when questions arise.

- ❑ **Assign first practical task with clear deadline**

Give your VA a real, low-stakes assignment with a specific completion time. This provides immediate hands-on experience and reveals how well they understood your instructions and standards.

- ❑ **Request confirmation of understanding for each major process**

Ask your VA to explain procedures back to you in their own words or complete a brief quiz on key processes. This active confirmation catches misunderstandings before they become costly mistakes.

- ❑ **Set up daily check-in rhythm**

Establish a pattern for brief daily updates (5-minute written summary or quick call) where your VA shares what they completed and plans for the next day. This predictable rhythm builds connection and keeps work aligned.

4. Days Four-Five: Quality Verification & Feedback

- ☐ **Review first completed tasks with specific feedback**

Evaluate your VA's initial work using the SBI method (Situation-Behavior-Impact). Point out both what they did well and what needs adjustment with clear, constructive explanations that help them improve.

- ☐ **Update or clarify any confusing procedures based on questions**

If your VA encountered confusion or asked clarifying questions, immediately update your SOPs to prevent future team members from hitting the same stumbling blocks. Great procedures evolve through real-world testing.

- ☐ **Introduce decision-making guidelines and approval boundaries**

Clarify which decisions your VA can make independently and which require your approval. For example, they might handle routine customer questions alone but escalate refund requests. Clear boundaries empower smart judgment.

- ☐ **Schedule first weekly meeting for end of week**

Book a 15-30 minute video call to review the entire first week, celebrate wins, address challenges, and plan ahead. This longer conversation strengthens the partnership beyond daily task exchanges.

5. End of Week: Optimization & Planning

- ☐ **Conduct comprehensive first-week review session**
Discuss what went well, what proved confusing, and how processes can improve. Ask your VA for honest feedback about their experience and suggestions for better collaboration. This two-way conversation builds mutual respect.
- ☐ **Identify gaps in training or documentation**
Note any areas where your VA struggled due to missing information or unclear procedures. Commit to filling these gaps before expanding their responsibilities further.
- ☐ **Set goals and priorities for week two**
Outline what you expect in the coming week, any new tasks being added, and success metrics you'll track. Clear forward-looking expectations help your VA prepare mentally and practically.
- ☐ **Express appreciation and confirm ongoing partnership**
Acknowledge your VA's effort during this intense onboarding week and affirm your commitment to the relationship. Recognition and encouragement during the learning phase build loyalty and motivation that compound over time.