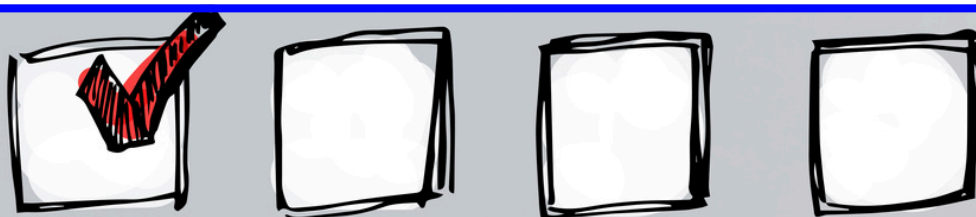# VA Prep Checklist

Use this checklist to prepare your business before hiring a Virtual Assistant.

VAs don't come with built-in structure and knowledge of how your business "should" work. They thrive when systems are already in place.
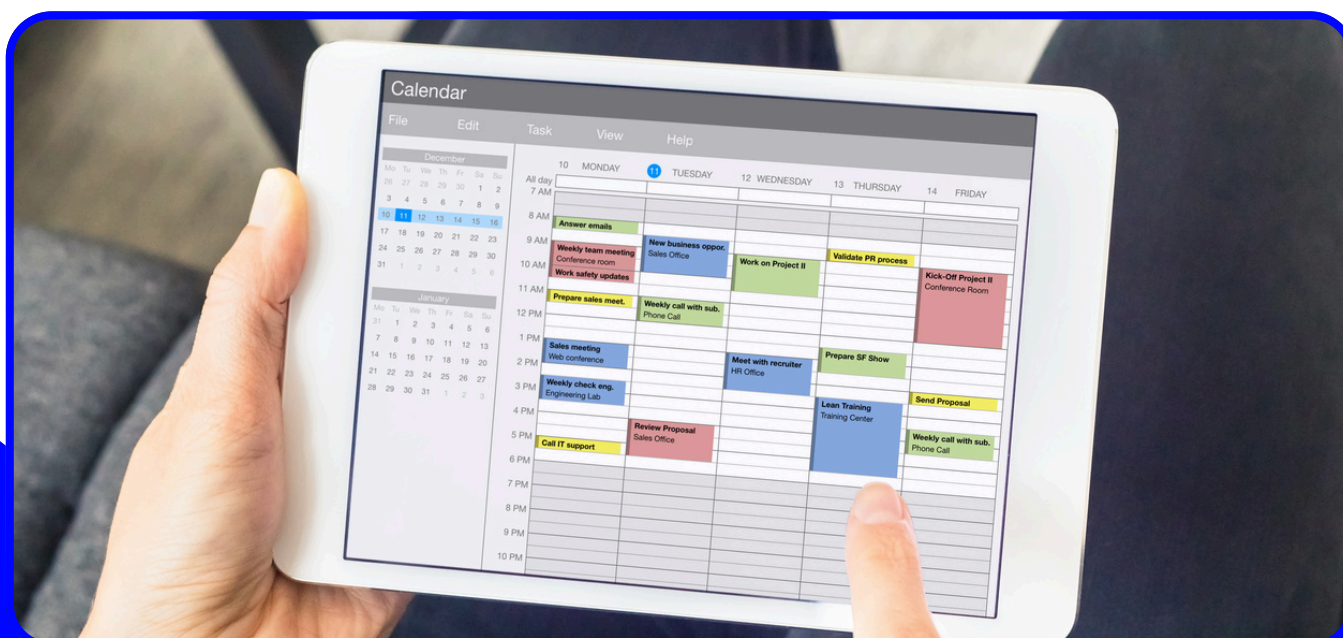
This checklist helps you assess and build the clarity, tools, and expectations needed to make your next VA hire successful.

1. Task Audit Template

Identify the recurring, administrative, or low-leverage tasks you want to delegate.

| Task / Process	Frequency	Estimated Time	Can This Be Delegated? (Y/N)

1. Task Audit Template Example

Identify the recurring, administrative, or low-leverage tasks you want to delegate.

Task / Process	Frequency	Estimated Time	Can This Be Delegated? (Y/N)
Responding to customer emails	Daily	45 min/day	
Posting to social media	3x per week	30 min/post	
Scheduling calls or meetings	As needed	20 min/week	
CRM data entry	Weekly	1 hr	
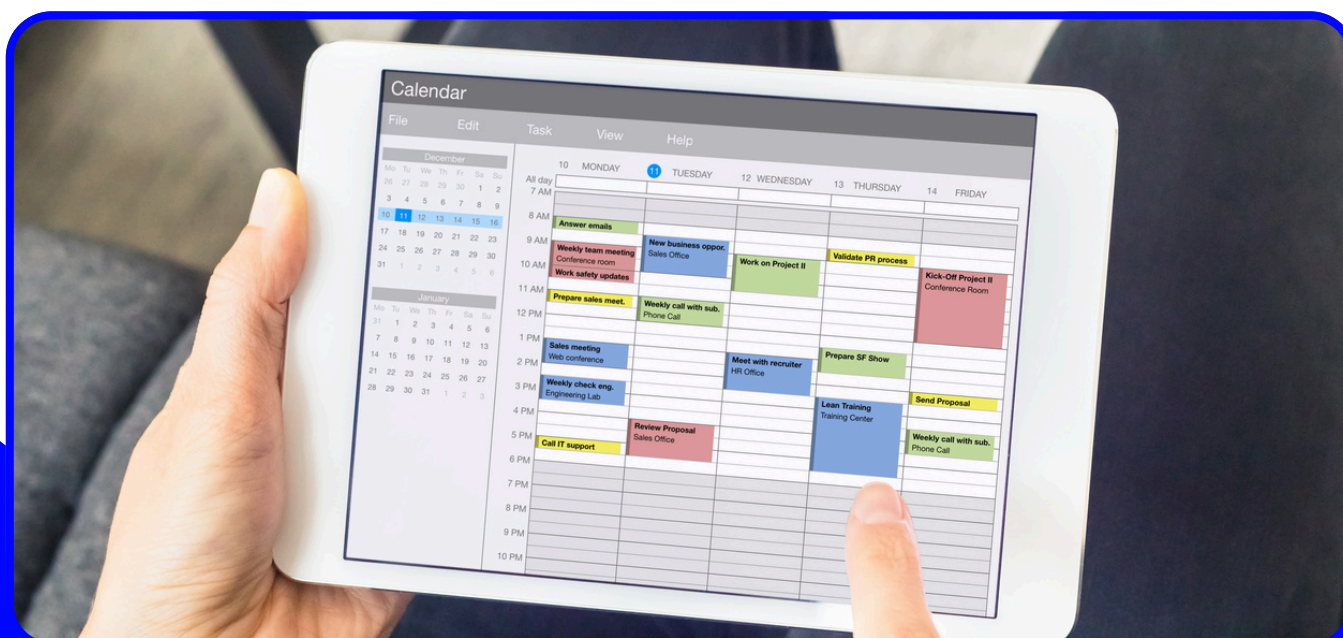
2 SOP Draft Starter

Choose 2–3 tasks from your audit and begin documenting them using this format:

Task Name: _____

Purpose: (Why this task matters) _____

Frequency: (Daily / Weekly / Triggered) _____

Tools Needed: (e.g., Gmail, Pipedrive, Canva) _____

Steps:
1. _____
2. _____
3. _____

Completion Criteria: (How you know it's done right) _____
_____
_____

3. Tool Access Checklist

Make a list of the software and platforms your VA will need access to — and whether access is ready.

Tool / Platform	Purpose (e.g., email, scheduling, CRM)	Access Setup? (Y/N)

3. Tool Access Checklist (Example)

Make a list of the software and platforms your VA will need access to — and whether access is ready.

Tool / Platform	Purpose (e.g., email, scheduling, CRM)	Access Setup? (Y/N)
Gmail / MSOffice	Email and communication	
Calendly/Other	Scheduling	
DevStride / ClickUp	Task and project management	
Duda / WordPress	Website edits	
Pipedrive / Other	Sales pipeline and contacts	
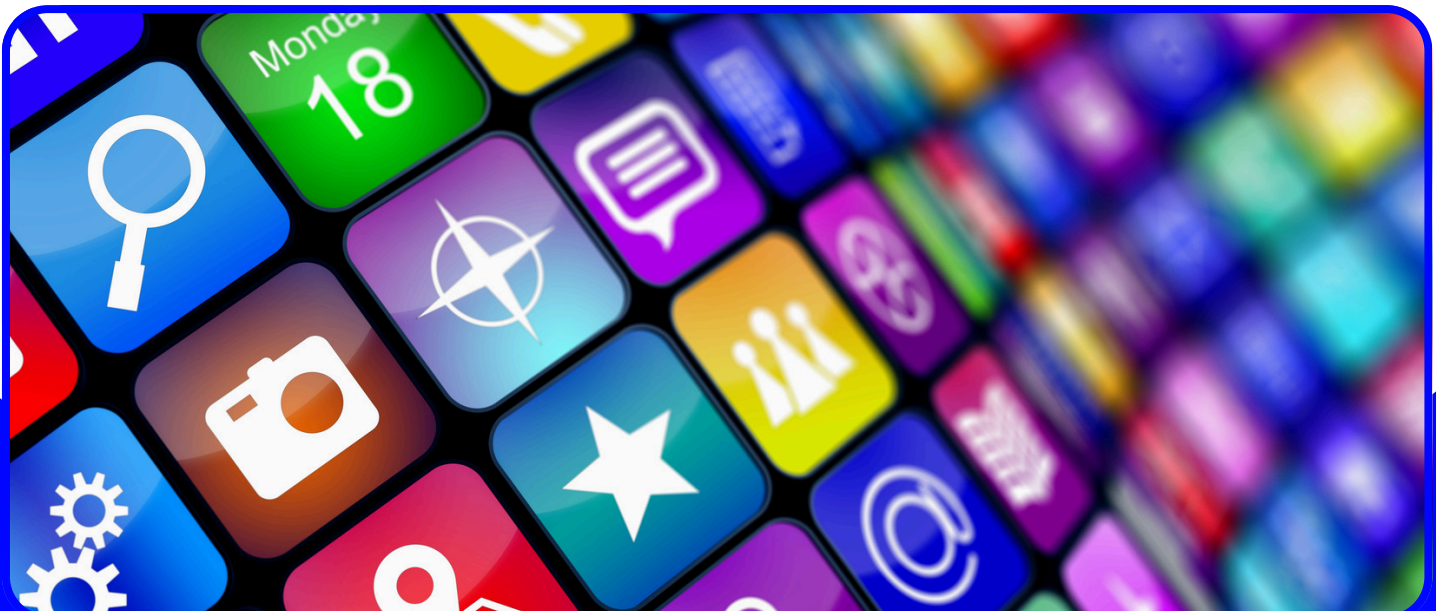
4. Onboarding Flow Template

Create a simple onboarding sequence to follow after hiring.

Step #	What Happens	Owner	Timeline
1			
2			
3			
4			
5			

4. Onboarding Flow Template (Example)

Create a simple onboarding sequence to follow after hiring.

Step #	What Happens	Owner	Timeline
1	Welcome message + company intro	You	Day 1
2	Assign accounts, passwords, access	You/Tech	Day 1
3	Walkthrough of task manager + training resources	You or PM	Day 2
4	First tasks assigned	You	Day 2–3
5	First feedback meeting	You	End of Week 1

5. Weekly Review Rhythm Planner

Keep your VA aligned with weekly check-ins and feedback.

Suggested Weekly Rhythm:

- Monday: Assign priorities and discuss blockers
- Wednesday: 10-minute check-in (as needed)
- Friday: Review completed work and give feedback

Use tools like Pipedrive, DevStride, Trello, Monday or a shared dashboard to track task completion and performance without micromanaging.

Don't know how to setup a shared dashboard, choose project management (PM) software, or even where to start? Talk to us…we eat this stuff for breakfast.

Final Tip:

Most VAs don't fail because of poor skills —
they fail because of unclear systems.

Set them up to win, and they'll create real capacity in your business.

That's how you go from reactive hires to strategic team building — and that's what sets you (and them) up to win.

SCAN HERE

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