Virtual Assistant Onboarding Checklist

Follow these 28 simple procedures to help you seamlessly and professional onboard your new (VA) virtual assistant.



COMPANY

- [ ] Company background
- [ ] Vision and values
- [ ] Company policies
- [ ] Company goals
- [ ] Role objective
- [ ] Organizational structure

TOOLS AND SOFTWARE

- [ ] Email access
- [ ] Password management
- [ ] Dashboards and tools
- [ ] Company chat and meeting software
- [ ] Project management software
- [ ] Time tracking software (if applicable)

EXPECTATIONS SETTING

- [ ] What are the KPIs and how your business measures them?
- [ ] What are the expected deliverables?
- [ ] Who should the VA report to?
- [ ] Who should they collaborate with?
- [ ] Are there reoccurring meetings?
- [ ] Are they required working hours?

DOCUMENTATION

- [ ] Past recorded trainings
- [ ] 3rd party courses
- [ ] Internal SOPs and documents
- [ ] Old tasks being transitioned
- [ ] New tasks being transitioned
- [ ] New projects on the pipeline
- [ ] List of priority projects

START OF WORK

- [ ] Deadlines (daily or weekly)
- [ ] Quality control and insurance
- [ ] Updates and checkins

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