

# Virtual Assistant Onboarding Checklist

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

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## 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
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- 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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