

How to Onboard and Manage a Virtual assistant

Turn your new hire into one of your highest-value assets

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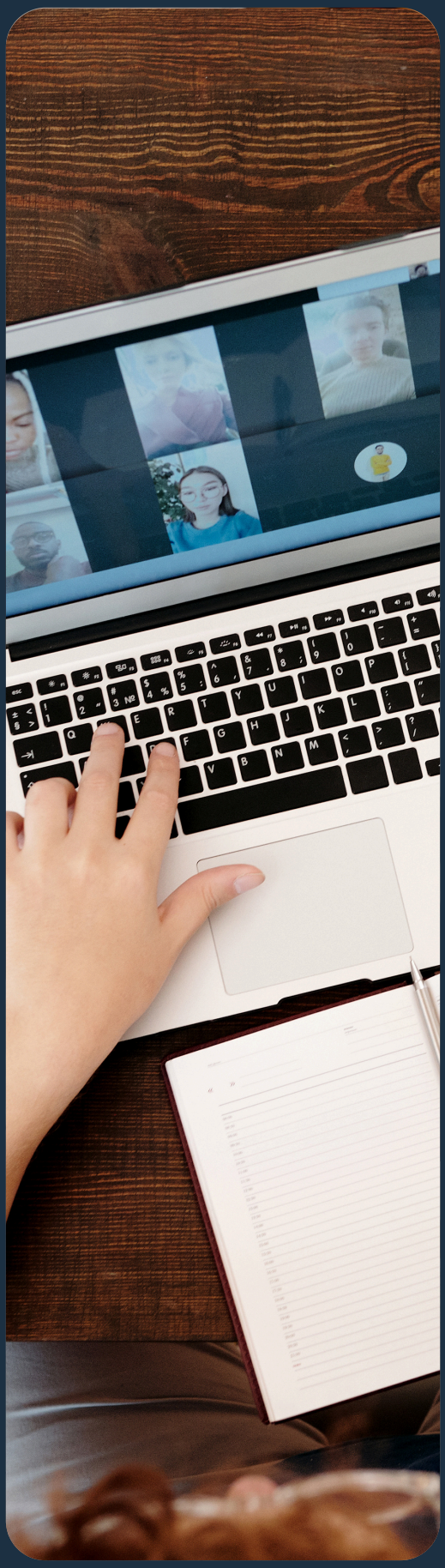
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Introduction

Each onboarding experience will be unique based on the role and the experience of the VA. These are guidelines and best practices for building a happy foundation.

We're here to work with you to ensure the first month is set up well and to help smooth out any bumps along the way. Our goal is simple: we want you to get the very best out of your VA, and we want your VA to stay and thrive long term.

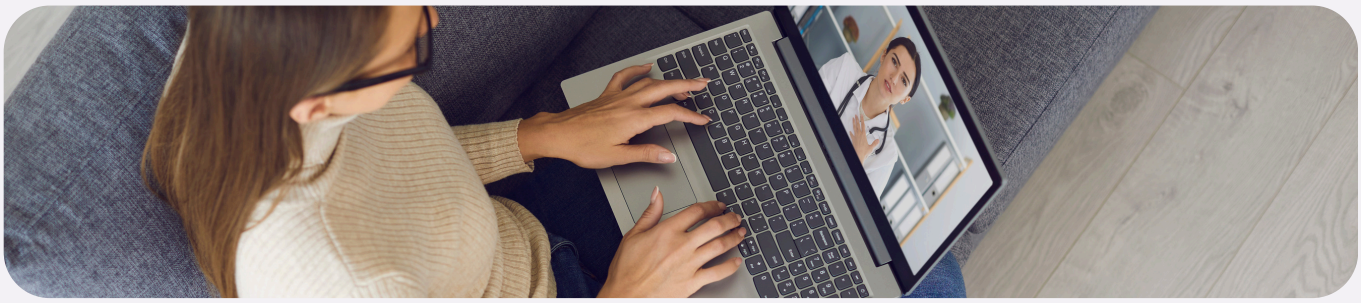
You've done the hard part. You've defined the role, hired your VA, and you're ready to get some breathing room back.

But here's where the real leverage starts. Hiring a VA isn't the finish line; it's the starting point. How you onboard and manage your VA in the first few weeks makes all the difference between **"just another task doer"** and **"trusted operator who makes your life easier and stays with your business long term."**

You are about to build a working relationship based on trust, clarity, and consistency. Those foundations—more than any individual process or tool—drive long-term success.

Here's what we walk you through

- What to prep before Day One.
- How to build trust and flow in the first 4 weeks.
- How to build a great VA relationship that lasts.
- What good looks like at 30, 60, 90 days.
- How to troubleshoot if things aren't clicking.



Keep it simple. Keep it structured. And remember — we're here to support you along the way.

Let's get your VA working for you so you can get back to the work that matters most.

Shane & Gav.

Founders of takemytasks.



Why onboarding matters?

You've invested time in hiring the right VA.

Now your goal is simple:

- **Get them productive fast.**
- **Build trust (both ways).**
- **Set them up for success so they stay long-term.**



Many founders lose good VAs not because they hired the wrong person, but because the early experience was inconsistent, unstructured, or disengaged.

In remote-first working relationships, **rhythm equals trust.** If your VA knows what success looks like, when they'll hear from you, and how they can contribute, they'll lean in and deliver. If those signals are missing, they'll retreat, and retention risk rises fast.

A few weeks of structured onboarding pays off for months (or years) of smooth execution.

This isn't about adding complexity. It's about making sure:

- The right work gets done, the right way.
- Your expectations are clear.
- The VA knows what good looks like.
- You build trust and stability, so they stay and grow with your business.

How to help your VA do their best work

- Show up consistently.
- Give simple, honest feedback.
- Make outcomes clear, not just tasks.
- Let your VA contribute, not just complete.

The clients who do this well keep their virtual assistants for years.



Before Day One: Prep what matters

In distributed teams, written clarity beats verbal reassurance. **The more structure you put in place before Day One**, the faster your VA can get up to speed, and the less energy you'll need to manage them daily.

Don't overload your VA with tools and 50 SOPs on day one. Focus on the essentials:

1. Confirm tools + access

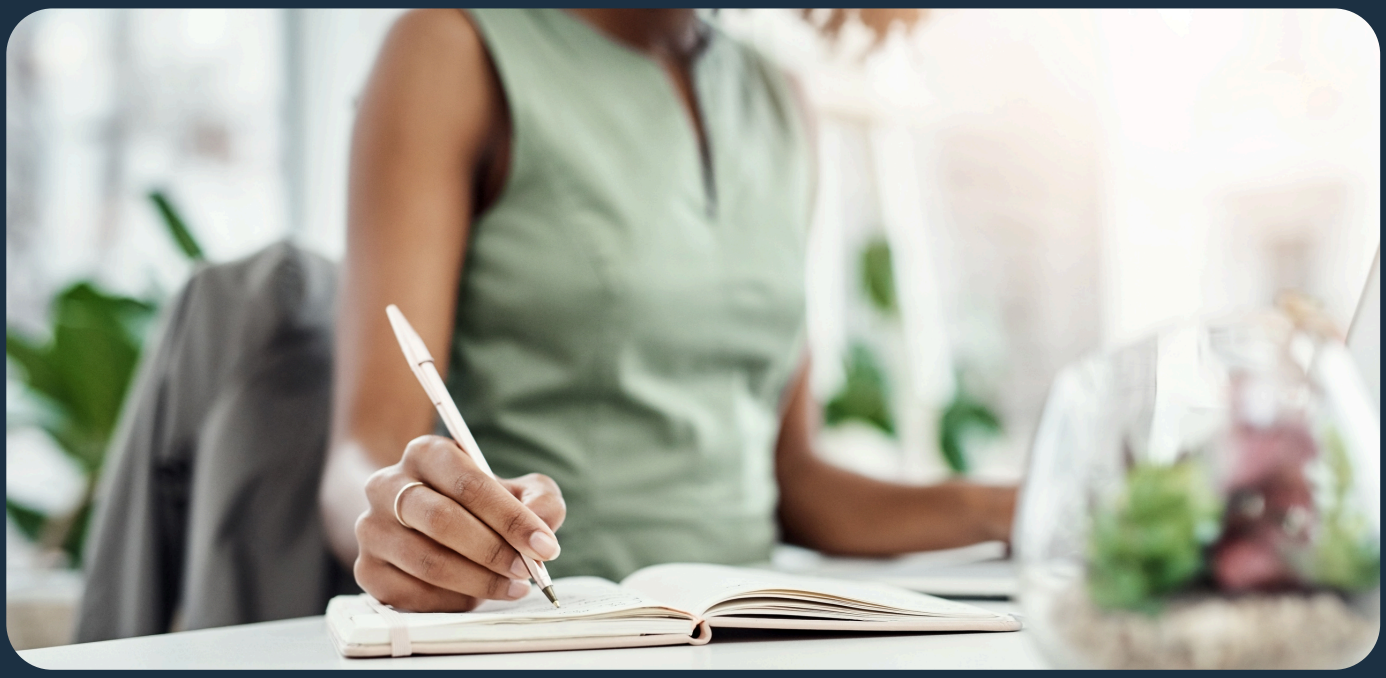
- **Primary comms:** Slack, WhatsApp, or email → agree which one
- **Task/project tracking:** ClickUp, Trello, Asana → give access + show where priorities live
- **File sharing:** Google Drive
- **Password sharing:** LastPass, 1Password

2. Define "done right"

List 3–5 key outcomes you want in the first 4 weeks:

- Inbox triage running smoothly
- Calendar managed without errors
- Content posted consistently
- CRM up to date
- Recurring admin processes documented

Clarity now prevents overwhelm.
Your VA can start focusing on outcomes, not guessing what matters.



Week 1: Build trust + create flow

Day One. Kickoff call

- Welcome + team intro if relevant
- Restate what success looks like
- Show where tasks live (ClickUp/Trello, etc.)
- Confirm how/when you want updates
- Assign 1–2 quick “early win” tasks

Why early wins matter:

Confidence and momentum are built through small, successful cycles. If your VA can accomplish useful work in week one — and get recognised for it — their commitment and trust in you deepens fast.

Document as you go

- Use Loom, Scribe, or Vidyard to record key processes
- As tasks repeat, your VA should document/refine steps

Build trust early

- Be present in the first week. Reply to questions.
- Say thank you when things go well, even on small tasks.

The biggest mistake we see:

Clients who try to **"set and forget"** a VA in the first 4–6 weeks almost always run into problems. A VA relationship needs to be built like a partnership, not a handoff. Show up consistently, especially early on.

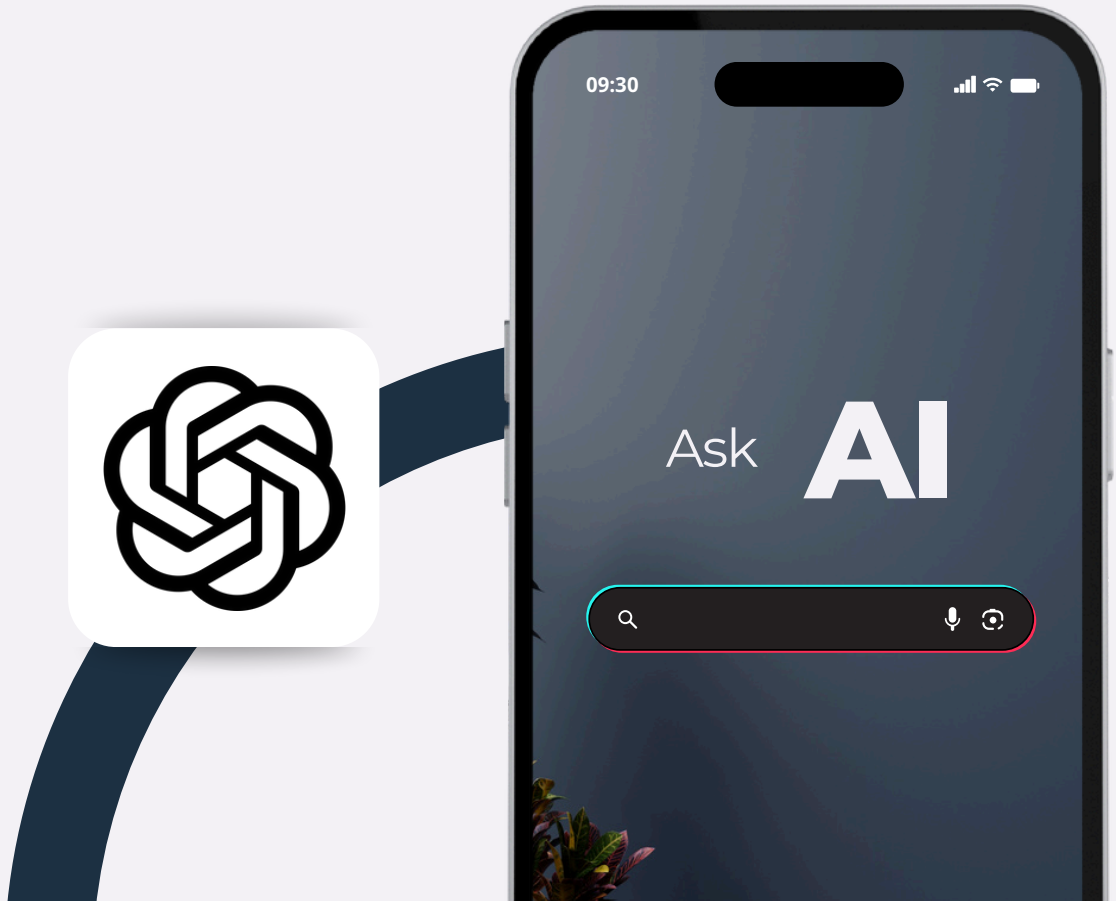
VAs who feel supported stay longer and take more ownership.



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How to create simple SOPs

(and a powerful ChatGPT prompt to help)



In remote work, process is what enables autonomy. And autonomy is what frees you to focus on your highest-leverage work.

You don't need a 50-page playbook. You just need enough structure that your VA can execute well and improve it over time.

5-Minute SOP Template

- **Task name:**
- **Purpose (why this task matters):**
- **When it should be done:**
- **Tools needed:**
- **Step-by-step:** (bulleted list is fine)
- **How to flag issues:** (who to tell, how to communicate)
- **Expected outcome:** (how you'll know it's done right)



ChatGPT prompt to help you draft your first SOPs

Copy this and fill in the blanks:

→ I am onboarding a virtual assistant and want to delegate the task of [TASK NAME]. Please help me write a clear, practical SOP for this task.

The VA is experienced but new to my business.
Here is key context to help you customise the SOP

1. My Business

→ Industry / type of business: [TYPE]
Business model (e.g. high volume sales, B2B, agency, coaching, product-based): [MODEL]
Key tools we use: [TOOLS]
Team size and structure: [SIZE / STRUCTURE]

2. The purpose of this task:

→ Why this task matters to my business: [PURPOSE]
How it impacts my customers, clients, or operations: [IMPACT]

3. When and how often this task should be done: [TIMING]

4. My expectations for quality and tone:

→ Is this a purely operational task, or does it require judgement/brand alignment? [ANSWER]
Are there any tone, language, or style considerations? (if client-facing) [ANSWER]

5. Preferred ways for the VA to flag issues: [HOW TO FLAG]

6. What a successful outcome looks like: [SUCCESS DEFINED]

7. Anything to avoid or watch out for: [RISKS / WARNINGS]

Output format:

Clear and practical SOP
Include: purpose, when to do it, tools needed, step-by-step, how to flag issues, what success looks like **Tone:** Friendly and practical, no corporate fluff.



Example output (what a good SOP looks like)

Task name: Managing my inbox (triage + simple replies)

Purpose:
Keep my inbox clear and organised so I can focus on emails that drive revenue or require my input. The goal is to reduce distraction, improve response times for clients/leads, and keep me out of admin.

When it should be done:
Twice daily (before 10am and again before 4pm, my local time)

Tools needed:

- Gmail
- Slack **(for flagging questions)**
- Google Drive **(for saved templates)**

Step-by-step:

- Log in to Gmail.
- Star any emails from: Clients / Active leads / Priority partners
- Move all newsletters or promo emails to the “Promotions” folder.
- Archive internal CC emails unless action is required.
- Respond to routine admin emails using my saved templates (see Drive → “Inbox Templates”).
- Flag any client emails that require my personal response → send me a quick Slack message with the link to the email and a short summary.
- Maintain folders → move old client threads into the appropriate archive folder once resolved.



How to flag issues:

- If unsure whether to reply to an email → Slack me the link and ask.
- If a client email looks urgent (payment issue, cancellation, complaint) → Slack me **immediately, no delay.**

Expected outcome:

- I only see high-value or urgent emails.
- Clients and leads are replied to within 24h, even if it's just an acknowledgment.
- Inbox is mostly clear by end of day.
- No important emails missed.



Notes:

- It's better to ask than to guess when you're not sure. Over time, you'll get a feel for my preferences.
- If you spot patterns in recurring emails that could be templated or automated, flag them — I'm always open to streamlining this process.



Pro tips:

- Involve your VA in documenting and improving SOPs. This builds ownership.
- Treat SOPs as living documents — they evolve with the work.
- Focus first on 3–5 repeatable processes that drive clear outcomes.

Weeks 2–4: Build rhythm and autonomy



Rhythm drives trust.

The more consistent your touchpoints, the more confident your VA will be in taking initiative and in staying with your business.

Weekly check-in (15–20 min)

- → Wins → What went well?
- → Blockers → What needs unblocking?
- → Next → What's priority this week?
- → Feedback both ways → What can be improved?

Protect this time:

Clients who run consistent check-ins retain their VAs at significantly higher rates. VAs who feel heard and connected perform better and stay longer.

Simple KPIs to track:

- → Responsiveness: 24h on email, 2h or less on Slack/WhatsApp
- → Accuracy: 95%+
- → Proactivity: Suggestions, process improvements
- → Flow: You feel less burdened by low-value tasks

Feedback tip:

If you give consistent small feedback in the first 4 weeks — even simple praise or course correction — your VA will feel safe to do more, not less. Silence is the single biggest destroyer of initiative.

Managing performance (and troubleshooting)

If something feels off:

- → Check your clarity first — are instructions specific enough?
- → Confirm access + training is in place
- → Review whether you're expecting too much too soon

Address early

- → Missed deadlines with no comms
- → Repeated clarification on same points
- → Quality declining over time

→ Raise it early via 1:1 feedback → If no change after 4–6 weeks → consider replacement.

Retention tip:

Good VAs crave feedback.
Lack of feedback sends a dangerous signal:
"I don't care enough to help you succeed."
Even simple positive or corrective feedback builds loyalty.



Scaling up (Month 2+)

Retention is driven by relationship, not just tasks. As your VA grows in their role:

- Share the 'why' behind your work, not just the 'what'.
- Connect their work to business outcomes — show impact.
- Involve them in simple process design conversations.
- Run a simple **"how are we working together"** 1:1 conversation by week 6–8. VAs who are invited to this kind of conversation stay longer — because they feel valued as partners, not just resources.





Tasks to layer in as trust builds:

- Light customer support
- CRM data hygiene
- Content scheduling
- Project tracking
- Research
- Process documentation

Gradual shift:

- Month 1 → Core admin + early wins
- Month 2 → Semi-autonomous on defined tasks
- Month 2 → Semi-autonomous on defined tasks

Async tip:

Don't expect your VA to sit on Slack waiting for micro tasks. Use your weekly check-in and your task tool well — this is what lets them scale with you and stay motivated.

Final onboarding checklist

Before Day 1:

- [ ] Tools + access prepped
- [ ] Communication style agreed (including check-in rhythm)
- [ ] Top 3–5 "success in 4 weeks" outcomes defined
- [ ] Access granted to task/project tools, file sharing, and SOP folder
- [ ] Welcome message or short intro video recorded for VA (optional but helps build connection)



Week 1:

- [ ] Kickoff call done (including "what success looks like" conversation)
- [ ] 1–2 early win tasks assigned → fast feedback loop established
- [ ] First key process recorded or documented (VA involved in documenting if possible)
- [ ] VA knows how/when to ask questions + how to flag issues
- [ ] Positive feedback given during first 5 working days (small wins reinforced)

Weeks 2–4:

- [ ] Weekly check-in rhythm established and protected
- [ ] 3–5 core workflows documented → VA has clear processes to own
- [ ] Feedback loop running → VA receiving both positive and corrective feedback where needed
- [ ] Signs of proactivity acknowledged (when VA suggests improvements or flags gaps)
- [ ] First "how are we working together" 1:1 conversation booked (around week 6–8) — signals relational investment

Month 2+:

- [ ] Gradual task expansion underway → higher-value work delegated
- [ ] Autonomy increasing → VA managing repeatable workflows independently
- [ ] Client spending more time on high-leverage work
- [ ] Relationship rhythm continuing → weekly check-ins + occasional personal touch (thank you, connection to business outcomes, etc.)

Why this matters:

- A VA who experiences clarity, connection, and rhythm will stay longer, take more ownership, and drive better results.
- Clients who follow this checklist consistently see far higher VA retention and ROI.

Final note: Build a VA relationship that lasts

The biggest predictor of long-term VA success isn't "the perfect hire" — it's how well you onboard, manage, and build trust.

If a VA feels supported, knows what success looks like, and sees a path to grow their role → they stay, take more ownership, and become a real asset to your business.
Remote-first leadership is about rhythm, relationship, and results.



- Rhythm builds trust.
- Relationship drives retention.
- Results come from consistency and clarity.

Book a call with our team to get started.

We'll match you with the right VA for your business,
and support you through every step of onboarding and beyond.